

STAFF REPORT

STYLE MANUAL: Second Edition

For Preparing Public Interest Energy Research (PIER) Program
Technical Research Project Reports



CALIFORNIA
ENERGY COMMISSION

Arnold Schwarzenegger, Governor

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Bob Aldrich
Susanne Garfield-Jones
Lana McAllister
Carol Robinson
Carolyn Walker
Michael Wilson
Primary Authors

Carol Robinson
Project Manager

Susanne Garfield-Jones
***Assistant Executive Director
Media and Public
Communications Office***

Melissa Jones
Executive Director

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PREFACE

This style manual is intended to assist California Energy Commission staff, contract managers, and consultants/contractors when preparing a PIER project report to submit under an Energy Commission contract for the Public Interest Energy Research (PIER) Program.

If your contract is for **technical research** that results in an interim or final report for the PIER Program, use this *STYLE MANUAL (Second Edition): Preparing Public Interest Energy Research (PIER) Program Technical Research Project Reports*, Energy Commission publication number CEC-180-2010-004, published April 2010.

If your contract is a project other than technical research, but is written for the PIER Program, please use the style manual for consultant reports: *Style Manual (Second Edition) for Preparing Contract and Consultant Reports for the California Energy Commission*, publication number CEC-180-2010-002, published March 2010.

All PIER technical research reports written under contracts that were awarded after March 31, 2010, must use this second edition of this *Style Manual* unless this manual is superseded by a subsequent version or revision.

The most recent version of this manual and templates for use with Microsoft® Word® that can be used to develop Energy Commission PIER reports are located at:

www.energy.ca.gov/contracts/pier/contractors/

The project's Contract Terms and Conditions may provide additional information about producing Energy Commission reports or other printed materials.

If you are not sure these guidelines apply to your report, or if you have any questions about the information provided in the manual, please contact your Energy Commission contract manager or e-mail Media and Public Communications Office staff at: mediaoffice@energy.state.ca.us

ABSTRACT

This report is the manual of style to be used when writing technical, research reports funded by the California Energy Commission's Public Interest Energy Research (PIER) Program. This document helps PIER Program project teams write interim and final project reports that meet the Energy Commission's requirements for technical research report content, style, and format. This document will be published online with links from the PIER and contracts office Web pages. Microsoft® Word files for the PIER styles template, cover, and credits pages can be downloaded from those Web pages as well.

This document may be revised as the Energy Commission deems necessary. Please check for the latest version at:

www.energy.ca.gov/contracts/pier/contractors/

Keywords: California Energy Commission, consultant, contractor, writing, style manual, guide, guidelines, report, papers, presentations, preparation, publication format, PIER reports, Public Interest Energy Research Program, research

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CHAPTER 1:

What This Manual Is About

Hard writing makes easy reading.

— Wallace Stegner

Introduction

The Energy Commission produces several hundred reports, brochures, and other printed items each year. These publications¹ are used to convey information at public meetings, are printed and sent to libraries, **and are required to be placed on the Energy Commission website www.energy.ca.gov**. The Commission contracts with various entities to write reports on specific topics. This manual is geared toward assisting contractors or consultants² in preparing research reports for the Public Interest Energy Research (PIER) Program of the Commission.

Please note that many Energy Commission contracts require that periodic progress or status updates be written. This manual does not cover those progress or status reports, including the final status report of a contract.

The Energy Commission management believes that all material the agency produces should properly reflect our image and identity including name, seal, logos, Governor and Energy Commissioner names, and other relevant information. This principle is not to suggest that all printed documents be identical in appearance; however, all documents need to have a consistent design; be grammatically consistent, clear, and concise; and have an instant identity with other materials the Commission has prepared.

As an author, you have the opportunity to demonstrate skill, creativity, and pride in your work as well as an obligation to meet the expectations of your audience and the Energy Commission. Readers should be able to rely on consistent, professional quality – regardless of the subject matter.

We understand that you need to know what is expected to produce a quality report, presentation, brochure, or other material. This ***Style Manual*** clarifies the approved style conventions at the Energy Commission, including information on the approval process, and formatting a Commission report or paper. One chapter is devoted to writing, including strategies for organizing a document, editing sentences, grammar, punctuation, mechanics, and proofreading. It is not our intention to create an entire grammar text or one that teaches a

1 The terms "publications" and "documents" are used interchangeably throughout this manual to refer to Energy Commission reports, papers, brochures, flyers, handouts, presentations, and all other types of printed and delivered materials.

2 The terms "contractor" or "consultant" are used interchangeably. To reduce confusion, the company contracted by the Energy Commission to produce a report will, hereafter, be referred to as "the contractor." The report they are writing for the Commission is called the "PIER research report."

person how to write. Rather, we want to address the items that seem most vexing to staff and other writers. For a complete and comprehensive source, we recommend that contractors purchase and use *The Gregg Reference Manual, Tenth Edition*.

The Media and Public Communications Office also uses the *Associated Press Stylebook and Libel Manual* and recommends *The Dictionary of Concise Writing* to reduce clutter in prose.

When these books do not clarify an issue in grammar, mechanics, and usage, the office relies on *The Elements of Style* by William Strunk Jr. and E.B. White and *The Little, Brown Handbook* by H. Ramsey Fowler and Jane E. Aaron.

This ***Style Manual*** should be made available to all contractors preparing a report for the Energy Commission PIER Program, and it is part of their contractual obligation to follow the Commission's report format.

When Commission staff members receive a report from a contractor, they should peruse the document to make sure it is free of grammatical errors, formatted to the Energy Commission's style, and is clear to the lay reader. If the report fails any of these criteria, it should be returned to the writer to revise it to the Commission's standards.

If you have additional questions, please do not hesitate to call the Media and Public Communications Office at 916-654-4989.

Why Should You Use This Style Manual?

The Energy Commission uses much of what's contained in this ***Style Manual*** for its own staff, Committee, and Commission-adopted documents. By using this ***Style Manual***, you will ensure that Energy Commission PIER research reports have a consistent appearance and will be acceptable under the terms and agreements for contracts. It is the Energy Commission contract manager's responsibility to ensure that any report done under contract follows this manual before final retention funds are released.

This document replaces all previous Energy Commission publications, memos, and directives regarding report style and document conventions. Please recycle all previous editions of this manual.

Above all, using this ***Style Manual*** will free you from making decisions about formatting and writing style so that you can concentrate on the more creative elements of writing, the content of a document.

There are legal grounds for "good writing." California Government Code Section 6219 says:

- 6219. (a) Each department, commission, office, or other administrative agency of state government shall write each document that it produces in plain, straightforward language, avoiding technical terms as much as possible, and using a coherent and easily readable style.
- (b) As used in this section, a "state agency document" means any contract, form, license, announcement, regulation, manual, memorandum, or any other written communication that is necessary to carry out the agency responsibilities under the law.

Additionally, public funds pay for the reports. So, the public deserves the best document for its money. It deserves reports or papers that are clear and well written.

Updates to the Style Manual

This *Style Manual* is a working document. The Media and Public Communications Office staff has tried to make it current; however, language, styles, and technologies change. The staff will regularly review this manual and incorporate any necessary changes into future editions.

The Media and Public Communications Office encourages your creative comments and constructive suggestions on improving the clarity of this manual and making it easier for you to use. Please contact Carol Robinson, the Energy Commission chief editor, at:

Media and Public Communications Office
1516 Ninth Street, MS-29
Sacramento, California 95814
Phone: 916-654-4989
E-mail: mediaoffice@energy.state.ca.us

Major Updates Since Last Edition

There have been some major and minor changes throughout the *Style Manual* correcting errors and mistakes. The following are the main updates that have changed since last edition.

- Cover is redesigned to be a more modern, professional look.
- Credits page moved to inside of the front cover, and no blank pages are used after the cover and credits pages.
- Citation information moved to bottom of the abstract and keywords page.
- Headings and subheadings have decreased in point size from the previous edition. See **Table 1** for full listing of fonts and sizes to be used throughout all reports.
- The Commission has changed the requirement that blank pages need to be inserted at the end of chapters or after certain parts (acknowledgments, preface, abstract). This change will reduce the amount of paper being used in reports. Blank pages, however, still should be inserted after the following pages so that the next section begins on the right-hand side.
 - Following single-page acknowledgements page.
 - Following table of contents, list of figures, and list of tables.
 - Following executive summary.
 - Insert a blank page so that Chapter 1 always begins on the right-hand side.

Do not put blank pages after the cover or credits page. The credits page is now the backside of the cover. Do not put blank pages at the end of chapters so that next chapter begins on the right side.

- Additional items have been added to the “Word Use and Misuse” section, Chapter 7.
- The steps in the review process have been refined and clarified.
- Chapter 2, which was not completed for the previous edition, is now included.

CHAPTER 2:

Roles and Responsibilities for Preparing PIER Reports

This chapter explains the roles and responsibilities for each party that is involved with the creation and publishing of research documents under the Energy Commission's Public Interest Energy Research (PIER) Program. This manual applies to reports on research funded by the PIER program and associated publications. Two other separate style manuals are available for consultant reports contracted by the PIER Program or Commission reports.

Roles and Responsibilities

Person Division Unit	Role	Responsibilities
Contractor	<p>Perform research and/or manage subcontractor research.</p> <p>Prepare and/or manage preparation of research report(s) or publications.</p>	<ul style="list-style-type: none">• Pre-plan and conceptualize contract deliverable report(s) and/or technology transfer material(s).• Submit outline of report to Commission contract manager / program manager (CCM/PM).• Ensure the technical accuracy of information provided in report(s).• Ensure style, format, and content of report follow PIER Style Guide, and use Energy Commission templates. The guide and templates are located at: www.energy.ca.gov/contracts/pier/contractors/• Submit draft report to CCM/PM for suggestions/approval.• Incorporate any changes to draft report suggested by the CCM/PM.• Participate in meetings (in person/WebEx meetings/telecom) to finalize project report(s) or publication materials.• Submit final project report(s) and/or publication materials to CCM/PM in a timely manner, and in required format (e.g. Word format with report's graphic files as separate files on a CD).

Person Division Unit	Role	Responsibilities
Commission Contract Manager / Program Manager (CCM/PM)	<p>Manage and approve contractor's and subcontractor's work.</p> <p>Publish research results and other written products such as project fact sheets.</p>	<ul style="list-style-type: none"> • Oversee project and ensure progress. • Ensure contractor/subcontractor has technical writing/formatting expertise or has access to someone who does as the deliverables/goals of the project require. • Review project report(s) for technical accuracy. • Ensure report meets contractual requirements. • Ensure report meets style, format, and content of PIER Style Manual and uses Energy Commission templates: www.energy.ca.gov/contracts/pier/contractors/ • Ensure report(s) reflect contract purpose, goals, objectives, and audience. • Suggest/request appropriate changes to project report(s). • Request editorial services if necessary. • Ensure all edits are incorporated into project report(s). • Prepare Form CEC-5 to accompany document for approval routing. • Fill out the "Notes Section" of Form 5 when appropriate. If an editor was used, include his or her name and phone number. Add any special instructions. • Obtain sign-off from supervisor or team lead, if needed. Then provide the Form 5 and report to administrative assistant. Administrative assistant will log the report into the division's log and obtain the Form 5 signatures. • Ensure edits requested by Form 5 approval signatories are incorporated into the report, and return for sign off. • Once full Form 5 sign off is received, provide electronic Word and PDF version of report to PIERPubs for uploading to the Energy Commission website. • Send hard copy report to Reproduction Unit indicating the number of copies required. • Notify contractor of location of Web-posted report.

Person Division Unit	Role	Responsibilities
Reproductions Unit	Printing report	<ul style="list-style-type: none"> Prints the report.
Energy Commission Library	Adds to Commission library catalog. Sends report to repository libraries across the state	<ul style="list-style-type: none"> Archives printed copies of PIER reports in Energy Commission library and sends copies to state repository libraries.
Administrative Assistant	Report tracking	<ul style="list-style-type: none"> Track status of reports and/or technology transfer materials sent through the Form 5 publication process. Provide publication assistance to CCM/PMs.
Cross-Cutting Unit	Project report publication assistance	<ul style="list-style-type: none"> Provide training to new editors for project report publication. Provide assistance to editors for project report publication. Provide assistance to CCM/PM for project report publication. Identify changes and/or updates needed to <i>PIER Style Manual</i>, general maintenance of <i>PIER Style Manual</i>. Resolve editing conflicts if necessary.

Person Division Unit	Role	Responsibilities
Media and Public Communications Office and Web Team	Reviews, edits, and publishes reports	<ul style="list-style-type: none"> • Review and edits reports under the Form 5 publication process. • When requested, and if time permits, provide report development and publication assistance to staff and/or editors. • Develops, updates, and/or revises the PIER project report <i>Style Manual</i>. • Assign publication numbers to reports and/or tech transfer materials. • Add reports and/or tech transfer materials to the On-Line Publications Database. • Create and submit a monthly report of posted report(s) and/or tech transfer publications to the Cross-Cutting Unit. • Create and submit quarterly report of missing publications to the Division's Cross-Cutting Unit. • Code project report(s) and/or tech transfer materials HTML pages for website. • Create appropriate links from various pages of report(s) and/or publication materials. • Upload reports to the Energy Commission's website. • Maintains archive of all electronic versions of Commission publications, reports, technical briefs, fact sheets, etc.

Contract Manager's Responsibilities

The contract manager is the authorized representative of the Energy Commission responsible for administering the contract, establishing and maintaining a good working relationship with the consultant/contractor, and monitoring and managing all contract terms.

The following summarizes the Energy Commission contract manager's responsibilities:

1. Monitoring the contract progress and performance to ensure that the contractor is performing the services according to the quality, quantity, objectives, and time frames specified in the contract.

2. Keeping in frequent contact with the contractor by phone or e-mail, and intermittently conducting on-site visits.
3. Revising the schedule of deliverable due dates as long as the new dates are within the term of the contract.
4. Preparing a CEC-84, Contract Progress Evaluation Form. This form documents the progress of the project, noting any problems or delays. It is submitted to the Energy Commission's Contracts Office monthly or quarterly depending on the contract terms but is always required when approving an invoice.

Note: PIER contract managers do not complete a CEC-8. Instead the progress report (completed by the contractor) addresses the project status.

5. Keeping the Commission contract officer informed regarding any potential problems or difficulties or changes in the contract.
6. Reviewing and approving the contractor invoices to:
 - a. Substantiate expenditures for work performed, including travel and per diem, and the rates billed do not exceed the rates in the contract budget.
 - b. Ensure there are sufficient funds to pay for all services rendered and required in the contract.
 - c. Identify spending levels and consider partial reduction of contract funds and reassignment of funds (within the limitations of the Contract Manager).
 - d. Ensure retention is withheld from the invoice, according to the retention language specified in the contract.
7. Closing out the contract by:
 - a. Ensuring that all work is completed and accepted before the contract expires.
 - b. Approving the final products, including the final report (following review and sign-off) and meeting, if required.
 - c. Verifying that the contractor has fulfilled all requirements of the contract before approving the final invoice and releasing retention.
 - d. Completing the Contractor Evaluation Form - STD 4, for consultant services contracts of \$5,000 or more and submitting one copy with the Final Report (if required) to the Contracts Office.
8. Verifying that one of the final deliverables, the PIER research report, if applicable, meets all Energy Commission style and formatting contained in this ***Style Manual***.
9. Overseeing the review and sign-off process (via a Form 5) before publication of the PIER research report on the Commission website.

CHAPTER 3:

Report Contents, Formatting, and Styles

Report Contents

All California Energy Commission Public Interest Energy Research (PIER) Program research reports should contain the following sections, in the following order:

- Cover page (**required**)
- Credits page on the reverse side of cover (**required**) with legal disclaimer (**mandatory on PIER reports**)
- Acknowledgements page (optional)
- Preface (**required**)
- Abstract, keywords, and citation page (**required**)
- Table of Contents (required, followed by List of Figures and List of Tables, if needed)
- Executive summary (**required**)
- Body of the report
- References (if applicable)
- Glossary/Acronyms (If more than 10 acronyms or abbreviations are used, it is required.)
- Bibliography (if applicable)
- Appendices (if applicable) (Create a separate volume if very large.)
- Attachments (if applicable)

Please note that this arrangement is slightly different than what was used in reports published prior to 2010. See Chapters 5 and 6 for a detailed discussion of report contents and parts.

Report Templates

When a report is written, you must format it using the Commission-approved styles. Energy Commission contractors must use the report typographic styles described in this manual. They are summarized later in **Table 2: Formatting Style Matrix for Reports**. (See page 16.) The most recent version of **this** manual and templates for use with Microsoft Word are located on the Energy Commission website at:

www.energy.ca.gov/contracts/pier/contractors/

The Energy Commission recommends that report writers begin their writing using the Commission document template available on the above website page. This template has been formatted to include all the styles explained in this report. Starting with the template will assure that you are using the correct formats for headings and other portions of the report.

Blank Pages

The Commission has changed the requirement that blank pages need to be inserted at the end of chapters or after certain parts (acknowledgments, preface, abstract). This change will reduce the amount paper being used in reports.

Blank pages should be inserted after the following pages so that the next section begins on the right-hand side.

- Following single-page acknowledgement page.
- Following table of contents, list of figures, and list of tables. Do not put blank pages after each of these. Just include a blank page after the tables and lists and before the executive summary.
- Following executive summary and before Chapter 1.

Do not put blank pages after the cover or credits page. The credits page is now the backside of the cover. Do not put blank pages at the end of chapters so that next chapter begins on the right side.

Figures, Graphs, and Tables

Figures, graphs, and tables (graphics) should be clear and readable. Source lines are required on all figures and graphs. Credits are required on all photographs.

The graphic should be introduced in the paragraph before and explained fully. Do not download and use low-resolution graphics from the Internet, such as in **Figure 1**. While these may appear to look fine on your computer monitor, when printed the picture will bit-map and look blurry.

Figure 1: Low-resolution Graphic Downloaded From Internet



Example of low-resolution (72 dpi) seal downloaded from Energy Commission website and enlarged for effect.

Graphics or photos used on the Internet are typically 72 or 96 dots per inch (dpi) graphics files. Most reports are printed at 300 dpi. So, the graphic will appear very blurry when printed.

The title or label of a figure, graphic, or table should be typed in as part of the report and not part of the graphic. The reason is that the graphic may have to be resized to fit the page. If the label is part of the graphic, the size of the label will change depending on the resizing of the graphic.

The figure title should use the “Figure Titles” style in **Arial, 10 pt., bold, centered** similar to the example on the previous page or in **Figure 2** below. Fonts used within figures, graphs, and tables can be either serif or sans-serif as long as that font presents the information clearly and is readable. Most, however, use a sans-serif font like Arial or Helvetica for the information in figures, graphs, or tables.

Captions, credits, or sources listed below a figure, graph, or table should use the style specified in the formatting matrix (Arial, 10 pt.). Captions and sources should also be separate from the figure or table and not embedded in the graphic file because of accessibility issues.

If used, the list of figures and list of tables should be automatically generated in a manner similar to the table of contents. If a figure or table title is particularly long, hand-edit it in the list of figures/list of tables as you see fit.

Original copies of graphics files (for tables, charts, etc.) must be submitted with your report. (See **Chapter 11**.) If a chart or graph was created in Excel, that Excel file should also be submitted with the report.

Figure 2: Example of a Graphic Properly Used In a Report



SOLARA is the first apartment community in California to be fully powered by the sun and is the first project delivered under the California Energy Commission New Solar Homes Partnership Program.

Photo Credit: Community HousingWorks, developer/owner of SOLARA.

Use of Colors in Graphs and Figures, Size of Fonts, and Other Graphic Elements

Many times our reports are photocopied only in black and white. Therefore, it is important to use colors in charts, graphs, and figures that will reproduce well on a photocopy machine. Think and plan ahead for future readers because a chart maybe photocopied from a photocopy. You want the information to be clear and easy to understand; the numbers should be large and clear enough to be read.

Additionally, graphs and figures may need to be reduced in size to fit on a page within the text. Make sure the font size in the graphic is large enough to be read if the graphic is shrunk in size.

Graphics or figures should be created at a minimum of 300 dots per inch.

Footnotes

Use footnotes (not endnotes) in Energy Commission reports.³ Use them sparingly to briefly clarify terms or concepts that the average reader may not understand. Place footnotes at the bottom of the page on which they appear. Do not place footnotes at the end of a section.

Insert footnotes using Word footnote feature: Insert > Reference > Footnote. Footnote numbering should automatically readjust as footnotes are added or deleted.⁴ Enter footnotes after periods or commas.

Do not use footnotes in report or chapter titles, and do not footnote headings or subheadings.

Page Breaks

If a subheading appears at the bottom of the page, but the text jumps to the next page, put a page break before the subheading. Font metrics may be slightly different depending on the computer operating system. Including a page break will ensure that headings are not left alone at the bottom of a page with no content.

Pagination

Use Palatino Linotype 10 pt. for page numbers, centered at the bottom of each page.

Pagination begins on the acknowledgements or preface page (as a Roman numeral – i, ii, iii...) and continues in lowercase Roman numerals through the abstract, table of contents, and lists of figures and tables (if used). The cover and credits pages are not numbered. Number the blank pages, but do not put "This Page Intentionally Left Blank" on blank pages.

On the first page of the executive summary (or Chapter 1 if there is no executive summary), begin numbering in Arabic numeral (1, 2, 3...), and continue sequential numbering throughout

³ The footnote number appears in the text as a superscript; the footnote is at the bottom of the page.

⁴ Microsoft Word will automatically superscript the footnote number at the bottom of the page. The Footnote Reference should be in Palatino 10 pt., as shown in these examples. Use Footnote Text style for the footnote itself. Do not add an extra space between footnotes; the spacing is built into the style.

the document. See **Chapter 5** for page numbering of those sections. Appendices and attachments are numbered separately than the main report. See **Chapter 6** for more on appendices and attachments.

Table of Contents, Lists of Figures and Tables

The table of contents and lists of figures or tables should be generated automatically using Microsoft Word pull-down menu: Insert > Reference > Index and Tables feature. (Appendices or attachments must be added manually.) The table of contents is based on the style headings assigned to each section. Check the table of contents to make sure it has been updated correctly after each series of edits. Checking that chapters and headings agree with the page numbering should be the last task before creating the Adobe Acrobat PDF or printing the final master copy for reproduction. See **Figure 8** for an example of a table of contents.

Report Formatting Styles

The Energy Commission has changed the typeface and size of fonts to use when creating reports in Microsoft Word. The following is a summation of the fonts and styles that are used in all Energy Commission reports. Exceptions to this include the final *Integrated Energy Policy Report* and some other specialized reports. Those exceptions must be cleared through the Media and Public Communications Office in advance of their design and layout.


Table 2: Summary of Font Styles for Energy Commission Reports

Body (Normal) Text	Palatino Linotype 11 pt., align left
Bullets (regular and numbered)	Palatino Linotype 11 pt., 0.25-in. hanging indent
Acknowledgements, Preface, Abstract, Table of Contents, List of Tables or Figures Heading	ARIAL 14 PT. BOLD, CENTERED ALL UPPER CASE
Heading 1 (Chapter Titles)	Arial 18 pt. Bold, align left
Heading 2	Arial 14 pt. Bold, align left
Heading 3	Arial 12 pt. Normal, align left
Heading 4	<i>Arial 11 pt. Italic, align left</i>
Heading 5 (Use very sparingly. It is not included in formatting palette.)	Palatino 11 pt., align left
Figure and Table Titles	Arial 10 pt. Bold, Centered
Captions	Arial 10 pt.
Sources and Photo Credit	Arial 8 pt.
Footnotes	Palatino Linotype 10 pt., align left
Page Numbers	Palatino Linotype 10 pt., centered

The following formatting style matrix provides a more comprehensive description of the approved style formats.

Table 3: Formatting Style Matrix for Energy Commission PIER Reports

Style Type	Definition	Example
<p>Normal</p> <p>Use for all “regular” text that is not assigned a special style (e.g. heading, bullet, caption, etc.)</p>	<p>Palatino Linotype 11 pt. Align left Spacing at single line, Space 0 pt before paragraph Space 8 pt after paragraph</p> <p>Palatino is used because of its readability due to its larger “x” height and “m” width.</p> <p>If Palatino is not available, use Century School 11 pt. (second choice) or Times New Roman 12 pt. (last choice).</p>	<p>Palatino Linotype (11 pt.) The quick, fast fox jumped over the lazy, brown dog.</p> <p>Century Schoolbook (11 pt.) The quick, fast fox jumped over the lazy, brown dog.</p> <p>Times New Roman (12 pt.) The quick, fast fox jumped over the lazy, brown dog.</p>
Appendix Text	Same as Normal	The quick, fast fox jumped over the lazy, brown dog.
Attachments	The Energy Commission does not require that its style format be used in documents that are attachments.	not applicable
Body Text	See “Normal” above	
Bullets	<p>Palatino Linotype 11 pt. Space 0 pt. before bullet Space 4 pt. after bullet</p> <p>Indent 0.25" with hanging indent of an additional 0.25"</p> <p>Additional level bullets are each indented another 0.25" with a hanging indent of 0.25".</p>	<ul style="list-style-type: none"> • Bullet item number 1 • Bullet item number 2 <ul style="list-style-type: none"> ○ Item number 2a ○ Item number 2b <ul style="list-style-type: none"> ▪ Sub-bullet to 2b <p>Follow last bullet with an extra hard return to separate bullets from next paragraph.</p>

Style Type	Definition	Example
Captions & Credits (Below Figures, Graphics, Charts, Drawings, Photographs, etc.)	<p>Arial 10 pt. Space 4 pt. before paragraph Space 8 pt. after paragraph Center on page (do not wrap text around the picture).</p> <p>Caption should be width of the graphic itself.</p> <p>Brief captions are preferred; however, some graphics may require a lengthier caption. Typically, captions should not introduce new information.</p> <p>Captions for photographs must include a credit line on a separate line in Arial, 8 pt., normal.</p> <p>Use a soft return between the caption and the credit with the individual and/or company name that supplied the photo. If a photo is copyrighted, then the copyright symbol © should be included and a written release form must be obtained from coyright holder.</p> <p>Only use high-resolution photographs of 150 to 300 dots per inch (dpi). Don't use 72 dpi photos or graphics "borrowed" from websites.</p> <p>A source line is required on all figures, graphics, and tables.</p>	<p>Figure 3: BiPV on Carport</p>  <p>Building-integrated solar photovoltaic roofing materials used in a carport by Solar Utility of Culver City, California. Photo Credit: United Solar Systems Corporation</p>
Credits for Photos and Source Information	Arial 8 pt.	See captions above.

Style Type	Definition	Example
Equations	<p>Use special characters if necessary.</p> <p>Center on new line.</p> <p>Every equation presented must be referred to and explained in the text.</p> <p>You can use Equation Editor in Microsoft Word to create the equation.</p> <p>If special characters are used to create the equation, however, make sure typefaces are supported and available across various computer operating systems or platforms. Occasionally, special characters may not be available in a standard typeface.</p>	$E=mc^2$ CO_2
Figure and Table Titles	<p>Arial Bold 10 pt. Centered Space 6 pt. before Space 12 pt. after</p> <p>Text in Figure Title case.</p> <p>Colon after the figure/table number and before title.</p> <p>Figures and tables can be numbered in a chapter number format (Figure 2-1, Table 2-3, etc.) or numbered sequentially throughout the entire report. Be consistent through the entire document. Do not mix formats.</p>	<p>Figure XX: This Is an Example</p> <p>Note: Title is in title case with no period at the end of the title unless it is a complete sentence.</p>

Style Type	Definition	Example
Figures, Graphs, Charts, Drawings, Photographs	<p>Figures should be centered. Align captions with left edge of figure.</p> <p>Avoid the use of Word text boxes wherever possible and insert the figures directly into the document.</p> <p>Every figure presented must be referred to in the text.</p> <p>If the figure is a graphic, picture or photograph, it should be at least 300 dots per inch (dpi). Do not use low-resolution Internet pictures (72 to 96 dpi).</p>	For an example, see Figure 2 on page 10.
Footnotes	<p>Palatino Linotype 10 pt. Spacing 0 pt before spacing 6 pt. after</p> <p>Note: The footnote reference number should be superscript in the text but not in the footnote itself.</p>	For an example of Footnotes, see bottom of page 12.
Graphs	<p>Do not title a graph while it is being created in separate software, such as Microsoft Excel. The figure title should label the graphic. The author, however, should strive for clarity.</p> <ul style="list-style-type: none"> • Please label all axes. • Use sentence case. • Include units. • Make sure point size is at least 14 pt. on all labels. 	
Glossary	<p>Use a table with the word, acronym, or abbreviation in the left column and the definition in the right column.</p> <p>Do not show the gridlines of the table. Do not use multiple tabs to “create” a table, but use the Word table function.</p>	

Style Type	Definition	Example
Heading 1 Chapter Titles	<p>Arial 18 pt. Bold Left aligned Space 12 pt. before Space 12 pt. after</p> <p>No additional return between the title of chapter and the first paragraph.</p> <p>Capitalize the word CHAPTER, followed by a colon, followed by a soft-return, followed by the title in Title Case on the next line.</p> <p>Use line breaks so as not to orphan words all alone on the next line.</p>	<p>CHAPTER 1: This Way To a Better Report</p> <p>See chapter titles throughout this report for other examples.</p>
Heading 2 First Subheading in Chapter Text	<p>Arial 14 pt. Bold Left aligned Space 6 pt. before Space 12 pt. after</p> <p>Should be an extra hard return between the ending of previous paragraph and the new subheading.</p>	<p>This is Heading 2, a Subheading</p>
Heading 3 Sub-subheading	<p>Arial 12 pt. Normal Left aligned Space 0 pt. before Space 3 pt. after</p>	<p>This is Heading 3, a Sub-subheading</p>
Heading 4 Sub-sub-subheading	<p>Arial 11 pt. Italic Left Aligned Space 3 pt. before Space 3 pt. after</p>	<p><i>This is Heading 4, a Sub-sub-subheading</i></p>
NOTE THERE ARE NO ADDITIONAL SMALLER HEADINGS IN THE FORMATTING PALETTE! DO NOT CREATE NEW ONES!		

Style Type	Definition	Example
Page Numbers	Palatino Linotype 10 pt. Centered Bottom of page	See bottom of this page for an example.
References – Bibliography	Normal style 0.25" Hanging Indent	This is an example of a reference that goes into a second line. The hanging indent approximates the end of the first last name.
Table Column Headings and Table Data Cells	Arial or Palatino Columns Heads – Bold Data cells – No Bold Size depends on amount of data in cell. Don't crowd cells.	
Title for following sections: Acknowledgements, Preface, Table of Contents, Abstract, and Executive Summary	Arial Bold 14 pt. All uppercase Space 0 pt. before Space 12 pt. after Note: Use a soft return to break the title into neat and easier to understand segments.	THIS IS THE TITLE STYLE FOR THE SECTIONS MENTIONED ON THE LEFT

CHAPTER 4:

Publication Steps for PIER Research Reports

Reports and Papers

Before beginning, you should understand how the Energy Commission publication process works. Publishing a report or paper with the Commission should not be all-consuming. It essentially breaks down into three areas (see Table 1 on next page):

- 1) **Steps 1 through 7** are generally pre-review.
- 2) **Steps 8 through 20** reflect the general steps for document review.
- 3) **Steps 21 through 26** involve publishing a report and distributing final master copies.

Review this ***Style Manual*** at the beginning of the writing process, and follow the format and styles in your PIER research report.

The most recent version of this manual and templates for use with Microsoft® Word® that can be used to develop Energy Commission PIER research reports are located at:

www.energy.ca.gov/contracts/pier/contractors/

**Table 4: California Energy Commission
PIER Report & Paper Creation, Review, and Publication Steps**

CONSULTANT AND COMMISSION CONTRACT MANAGER STEPS	1	Pre-plan and conceptualize the report. Determine target audience and scope.
	2	Outline and plan chapters and sections.
	3	Contract author(s) write draft of report.
	4	Author(s) edit draft of report, adds cover and credits pages, creates Table of Contents, and makes sure report uses Energy Commission style template.
	5	Contract author(s) sends draft of report to contract manager (and peers) for first review.
	6	Contract manager adds comments and suggestions. <i>(Note: Report will probably go back and forth between the author and the contract manager or colleagues a numbers of times before finalized into a final product to send to the Energy Commission for review.)</i>
	7	Contractor incorporates edits and comments into report and send first draft to Energy Commission for review and approvals.
CALIFORNIA ENERGY COMMISSION REVIEW PROCESS STEPS	8	Contact manager prepares CEC Form 5 to accompany report on sign-off route.
	9	Contract manager sends report to office manager for review and sign-off.
	10	Office manager sends report to division chief for review and sign-off.
	11	Division chief sends report to Media and Public Communications Office (M&PCO) for review, editing, and sign-off. Media office assigns publication number.
	12	After review, media office returns report to contract manager for edits to be incorporated.
	13	Contract manager asks contractor/author(s) to incorporate edits into report.
	14	Contract manager sends report back to Media and Public Communications Office for last review.
	16	M&PCO sends report to policy committee presiding member for review and sign-off (if applicable).
	17	M&PCO or commissioner office sends report to Executive Office for review and sign-off.
	18	Executive Office returns edited report to contract manager.
	19	Edits incorporated into report by contract manager or by consultant/contractors (depending on what contract stipulates). Final retention funds released to contractor after edits completed and all files are sent to and received by the Commission. Note: M&PCO may request that the report be sent back to that office for a final review once edits are incorporated.
	20	PIER Publications Unit sends FINAL Word, PDF, graphics, and other files to Webmaster for posting on Energy Commission website and for archiving. a. PIER Publications Unit creates Adobe Acrobat Portable Document Format (PDF) file. b. PIER Publications Unit checks ADA accessibility of PDF file and corrects areas not accessible (tags). c. PIER Publications Unit fills-in document properties of report in PDF file. d. PIER Publications Unit sends FINAL Word, PDF, graphics, and other files to Webmaster.
ENERGY COMMISSION PUBLISHING PROCESS STEPS	21	Word, PDF, graphics, and other files received by Webmaster for posting on Energy Commission website and for archiving.
	22	Web Team: a. Checks Americans with Disabilities Act accessibility of document. b. Checks document properties. c. Adds report information to publications database. d. Codes final report HTML page for website (if needed), creates links from various pages to report. e. Puts report and graphic image of cover on line.
	23	Webmaster sends PDF of final publication to Commission Library. These are sent at the beginning of each month on a CD-ROM.
	24	Publications Unit prints master paper copy and prints limited number of inventory copies.
	25	Library sends printed copies to state depository libraries.
	26	Webmaster archives electronic version(s) of publication in Word and PDF to be kept indefinitely.

Report Sequencing

Occasionally reports go through a number of steps or versions. Each version of the report is considered a separate report for review and sign-off. PIER interim research reports are treated as a separate document from final research project reports.

Please note, a report is not called “draft” when it is sent round for review. It is only called “draft” if it is to be published as a draft and a final report will be subsequently published.

Additionally, reports may also be revised and republished. In this instance, the Media and Public Communications Office will use the same publication number with a “REV” suffix added. The publication date on the cover should say “Revised: Month Date, Year.” For example, if a final Commission-adopted report were to be revised, the number stack on the cover would say:

CEC-100-2010-001-CMF-REV
Revised: February 27, 2010

The suffix is added when the report reaches Media and Public Communications Office (M&PCO) for its review and sign-off.

Errata and Additional Revisions to Reports

Occasionally a report needs small corrections because of typographical errors, or revisions are made after the report is published. If the errors are relatively minor, an errata sheet can be issued. The changes are physically made in the Word file of the document, a new PDF is created, and the publication number receives the suffix –ER[1] (numbers are used if more than one errata). The Media Office also adds a PDF of the errata sheet to the original document so that original document contains the errata sheet as part of the PDF. If the report has major revisions, then the suffix –REV is added. Use -REV2, -REV3, etc. if more than one revision.

CHAPTER 5:

Parts, Contents, and General Formatting of PIER Research Reports

Report Sections

As explained in Chapter 3, Energy Commission PIER research reports contain the following sections, in the following order:

- Cover page (**required**)
- Credits page (**required**) with Legal Disclaimer (**mandatory**) on the reverse side of cover
- Acknowledgements page (acknowledgements are optional)
- Preface (**required**)
- Abstract, keywords, and citation page (**required**)
- Table of Contents (required, followed by List of Figures and List of Tables, if needed)
- Executive summary (**required**)
- Body of the report
- References (if applicable)
- Glossary/Acronyms (If more than 10 acronyms or abbreviations are used, it is required.)
- Bibliography (if applicable)
- Appendices (if applicable) (Create a separate volume if very large.)
- Attachments (if applicable)

This chapter will describe each of those parts, showing examples, and explaining the processes involved in creation of those sections.

Cover and Credits Pages for PIER Research Reports

The cover and credit pages for Energy Commission PIER research reports use Microsoft® Word® files located at:

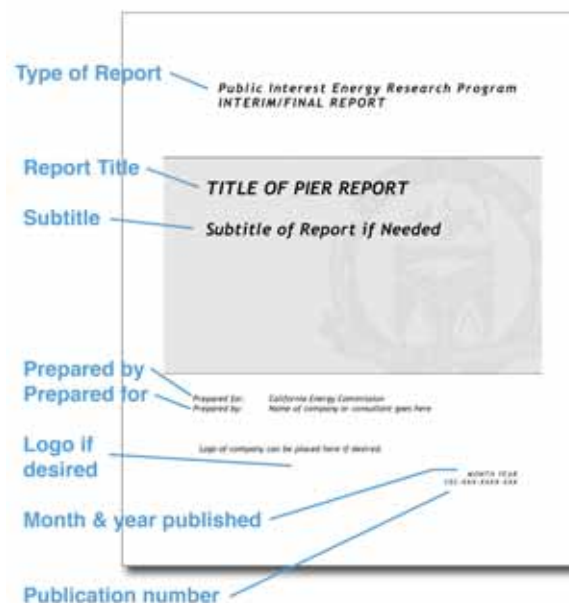
www.energy.ca.gov/contracts/pier/contractors/

The templates have been revamped and updated to correspond with this manual.

Cover of PIER Reports

Do not put a page number on the cover.

Figure 3: PIER Report Cover



The required elements used on these covers are shown in Figure 4 and are:

- Title of the report
- Subtitle of report (If not used, remove subtitle.)
- Type of report (PIER Interim/Final Report)
- Month and year published
- Publication number
- Published by: company name goes here
- Spot to put company logo if desired

Titles should be descriptive of the report. Titles are in ALL CAPITAL LETTERS in Corbel, 26 pt., bold. Subheadings are in Title Case Corbel, 24 pt. bold italic. Note that if report title is very long, you may reduce the font sizes so the title looks balanced on the cover.

Do not use abbreviations or acronyms in the titles of reports. Spell them out. For example, if the report is about Assembly Bill 32, do not use “AB 32” in the report title.

Credits Page of PIER Research Reports

The credits page of PIER reports requires a disclaimer and a listing of the company that wrote the report, the authors of the report, contract manager, and contract number among other items.

The credits page is now on the reverse side of the cover of the report. There is no blank page in between cover and credit pages. The credits are on the left-hand side of the page instead of along the right margin.

Figure 4: PIER Research Report Credits Page

The diagram shows a sample credits page for a PIER research report. On the left, blue labels with lines pointing to the corresponding text on the page are: Primary authors, Company info, Contract Number, Contract Manager, Project Manager, Office Manager, Division Chief, Executive Director, and Disclaimer. The page content includes the PIER logo (p i e r with the tagline 'Research Powers the Future'), a 'Prepared by:' section listing primary authors (John Doe, Jane Jones, Bill Smith, Martha Washington), a 'Company info' section for XYZ Company, Inc., a 'Contract Number' (XXX-XXX-XXX), a 'Prepared for:' section for the California Energy Commission, and a 'Disclaimer' box at the bottom. The disclaimer text states that the report was prepared as the result of work sponsored by the California Energy Commission and does not necessarily represent the views of the Energy Commission, the State of California, its employees, contractors, and subcontractors.

Primary authors — Prepared by:
Primary Author(s):
John Doe
Jane Jones
Bill Smith
Martha Washington

Company info — XYZ Company, Inc.
123 Main Street
Anywhere, CA 95814
916-555-1212 (optional)
www.xyzcompanyinc.com (optional)

Contract Number — Contract Number: XXX-XXX-XXX

Contract Manager — Prepared for:
California Energy Commission
XXXX XXXXXX
Contract Manager

Project Manager — XXXX XXXXXX
Project Manager

Office Manager — XXXX XXXXXX
Office Manager
Name of Office Goes Here

Division Chief — XXXX XXXXXX
Deputy Director
Division Name Goes Here

Executive Director — Melissa Jones
Executive Director

Disclaimer — **DISCLAIMER**
This report was prepared as the result of work sponsored by the California Energy Commission. It does not necessarily represent the views of the Energy Commission, its employees, contractors and subcontractors make no warranty, express or implied, and assume no legal liability for the information in this report, nor does any party represent that the users of this information will not infringe upon privately owned rights. This report has not been approved or disapproved by the California Energy Commission nor has the California Energy Commission passed upon the accuracy or adequacy of the information in this report.

The Credits Page requires the following parts:

- PIER Program logo to right of credits column ← **NEW**
- Name of primary author(s)
- Company project manager (if applicable)
- Company, organization, or affiliation name
- Location of author's company, organization, or affiliation (address, city, state, and ZIP)
- Company main phone (optional) ← **NEW**
- Company website address (optional) ← **NEW**
- Contract/Agreement number (**complete** contract, grant, work authorization, and/or project number(s), as applicable)
- Name of Energy Commission contract manager and project manager (if applicable)
- Name of Energy Commission office manager
- Name of Research Division Chief
- Name of Executive Director - Note: No Commissioners names are used on PIER reports.
- Energy Commission disclaimer

The following disclaimer must appear in a box on the credits page of all PIER reports.

DISCLAIMER

This report was prepared as the result of work sponsored by the California Energy Commission Public Interest Energy Research (PIER) Program. It does not necessarily represent the views of the Energy Commission, its employees or the State of California. The Energy Commission, the State of California, its employees, contractors and subcontractors make no warrant, express or implied, and assume no legal liability for the information in this report; nor does any party represent that the uses of this information will not infringe upon privately owned rights. This report has not been approved or disapproved by the California Energy Commission nor has the California Energy Commission passed upon the accuracy or adequacy of the information in this report.

The disclaimer title is in 12 pt. Arial, bold; and the disclaimer text is in 9 pt. Arial, justified. The border around the paragraph is ¼ point in size, and the spacing around the paragraph is 8 pt.

The credits page is now on the reverse side of the cover of the report. There is no blank page in between covers and credits pages. The credits are on the left-hand side of the page instead of along the right margin. The credits should be only one column long. If more space is required, please contact Media and Public Communications Office for direction.

Publication Numbers

All Energy Commission documents are assigned a publication number. The format for publication numbers became effective December 4, 2004. It corresponds to American National Standard (ANS) Z39.23-1997 for formatting and creating standard report numbers for technical reports. The publication number is not the Commission contract number.

The format for publication numbers is

CEC – 500 – YEAR – XXX – suffix – format id

The parts of the publication number are:

- The Commission identification with the ANS.
- The division, office, or program area number for which the report was originally written. Research reports are labelled as “500.”
- The year the report is published.
- The sequential number of the report for that division.
- A suffix (if needed).
- A format identification (such as -BR for brochure, -FS for fact sheet, -CD, -DVD).

A hyphen is used between each part.

Staff in the Media and Public Communications Office (M&PCO) will assign the publication number when the document reaches them for editing and review. The publication **number is not** the contract number of the project.

Suffixes at End of Publication Numbers

Suffixes are added by the Media and Public Communications Office to the end of the publication number only if necessary to differentiate appendices and attachments, various versions, volumes, editions, or parts of the same document. The suffix is preceded by a single hyphen.

Other Report Sections

Acknowledgements Page (Optional)

This page comes after the credits page and precedes the preface, abstract, and table of contents. Page numbering begins on this page with lowercase Roman numerals (i, ii, iii, iv, v, vi, etc.).

What Are Acknowledgements?

Acknowledgements express appreciation by the authors or project managers to those who participated in the gathering of information for or the writing of the report. It may be a paragraph or a bulleted list of names and, if appropriate, their affiliations. Acknowledgements are optional. PIER staff members listed on the report credits page should not be mentioned in the acknowledgements.

If there is a long list of participants who are to be acknowledged, put the names and affiliations in two or three columns in a small font size.

Preface Page (Required)

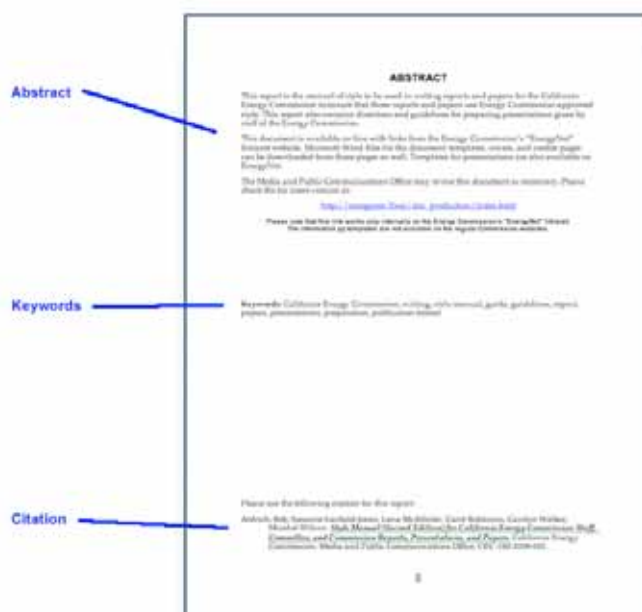
This page is boiler plate language that comes after the credits page and acknowledgements (if used) and precedes the abstract page and table of contents. Page numbering begins on this page with lowercase Roman numerals (i, ii, iii, iv, v, vi, etc.) if it did not begin on the acknowledgements page.

The preface is an introduction to the report generally explaining the subject, scope, or aim. It explains what program area the PIER research report falls into.

Abstract, Keywords, and Citation Page (Mandatory)

The abstract, keywords, and citation have been gathered together on one page. This page should be referred to as the “abstract page.” Below is an example.

Figure 5: Example of Abstract/Keyword/Citation Page



Abstract

All Energy Commission reports are required to have a short abstract. This concise, informative summary of the report should be less than 300 words – about a half page, single-spaced. (You can use “Word Count” in the “Tools” menu of Microsoft Word to check the number of words.)

The abstract should address the report purpose, scope, methods, and major findings, including the report results, conclusions, and recommendations.

Abstracting services publish abstracts to help readers determine whether a report is targeted to their area of interest; therefore, it should be understandable as a stand-alone document. The abstract should not contain undefined symbols, abbreviations, or acronyms, and should not

refer to specific elements of the main report. It should not refer to other reports unless it is essential to clarify the document purpose. If the report is a supporting document to another report, that information should be noted. Do not, however, include citations within the abstract.

Keywords

The abstract page must contain five or more keywords that will help search engines and other databases find the report subject matter. **Do not repeat words.** The keywords should be listed separately and spaced about five lines below the end of the abstract. Separate each word by comma – followed by a space – with no ending punctuation. For example:

Keywords: California, solar, energy, photovoltaic, PV, cell, panel, building, integrated, BIPV, electricity production, distributed generation, initiative, CSI, emerging, renewables, program, rebate

Citation Information

The citation used to be at the bottom of the acknowledgements or preface page. As those pages are optional, the citation has been moved to the abstract page.

It is mandatory to include a citation for your report in the following style:

- Author last name, author first name (or initial). Note: If there are multiple authors, list with chief author name first, or list alphabetically. The first name in the series should have the last name followed by first name; all subsequent authors have the first name, then the last name. Use commas between authors' names. If the authors work for a company, include that company name in parentheses.
- Indent additional lines by 0.5 inch.
- Year of publication by the Energy Commission.
- Report title in italics.
- California Energy Commission (as publisher).
- Energy Commission publication number assigned by Commission.

Citation Example:

Woolman, H., R. E. Moon (Engineering International). 2007. *Widgets and More*. California Energy Commission. CEC-500-2006-987. (That is, Woolman and Moon work for Engineering International, so this optional method of listing authors incorporates the authors and the company for which they work.)

Additional Examples:

Aldrich, Bob, Susanne Garfield-Jones, Lana McAllister, Carol Robinson, Carolyn Walker, Michael Wilson. 2010. *Style Manual (Second Edition) for California Energy Commission Staff, Committee, and Commission Reports, Presentations, and Papers*. California Energy Commission, Media and Public Communications Office. CEC-180-2010-001.

Burt, Charles, Darren Cordova (Irrigation Training and Research Center, California Polytechnic State University). 2002. *Electric Load Shifting in Irrigation Districts – California Program*. California Energy Commission. CEC-400-2002-002.

Unnasch, Stefan, Michael Chan (TIAX, LLC). 2007. *Full Fuel Cycle Assessment: Tank to Wheels Emissions and Energy Consumption*. California Energy Commission. CEC-600-2007-003.

Table of Contents

Include the following sections in the table of contents:

- Acknowledgement (optional)
- Preface (required)
- Abstract, Keywords, and Citation (required)
- Executive Summary (required in all PIER reports)
- Chapter number and title followed by subheadings using the following format:

Chapter 1: Chapter Title in Title Case (Heading 1)

- Subheading (Heading 2)
 - Sub-subheading (Heading 3)
 - Sub-sub-subheading (Heading 4)
- Appendices (if applicable) (Enter appendix letters and titles in the table of contents manually)
- Attachments (if applicable) (Enter attachment numbers and titles in the table of contents manually)

Generate the table of contents using Microsoft Word automated feature. To do so, go to Insert > Reference > Index and Tables > Table of Contents > OK. Add at least two levels of heads (no more than three) under the table of contents to help the reader know the contents of the chapters.

Following the table of contents, generate the list of figures and the list of tables, if needed, using Word automated features. To do so, go to Insert > Reference > Index and Tables > Table of Figures. Under “Caption Label” choose either Figure or Table, then in Options, Style, choose “Figure caption” (for a figure) or “Table caption” (for a table) > OK.

Update the table of contents, list of figures, and list of tables after all editing has been completed, and proofread to ensure that the entries are complete and correct. (Microsoft Word automatic table of contents feature, while very useful, is not perfect and can occasionally mis-create entries.) Note that appendix and attachment listings may need to be entered by hand. Do not provide page numbers for appendices or attachments.

The table of contents should use a right-hand tab, set at 6.5-inches, and with a dot leader for the page numbers. Set other tabs (for subheading and sub-subheadings) at 0.25- and 0.50-inch. Break long titles using a soft-return (shift-enter) and a hanging indent.

Figure 6: Example of Table of Contents From PIER Report Template

TABLE OF CONTENTS	
Acknowledgements	i
What Are Acknowledgements? ← Note: Use Heading 3 (if needed).....	i
PREFACE	ii
ABSTRACT	iii
TABLE OF CONTENTS	iv
EXECUTIVE SUMMARY	1
Heading 2.....	1
Heading 3.....	1
Heading 2.....	2
CHAPTER 1: Title of Chapters Are In Heading 1	3
Heading 1.1.....	3
Heading 1.1.1.....	3
Heading 1.2.....	4
Heading 1.2.1.....	5
Heading 1.2.2.....	5
CHAPTER 2: Note That There Is No Blank Page Between Chapters	7
Heading 2.1.....	7
Heading 2.1.1.....	8
Heading 2.2.....	9
Heading 2.2.1.....	10
APPENDIX A: Common Editor / Proofreading Marks	A-1

Executive Summary (Required in PIER Research Reports)

The executive summary is a final report in miniature, containing all the key information. It summarizes the report and should include the following headings:

- Introduction or Background
- Purpose (outlining the broad purpose)
- Objectives (if appropriate)
- Conclusions and/or Recommendations

These subheadings should appear in the table of contents.

The executive summary is intended to be short (preferred length is 2–10 pages). It can use a succinct, bulleted format to summarize the pertinent points under each of these sections, or can be more conversational (but still succinct). Assume a non-technical, management-level readership.

The introduction summarizes the purpose of the report and explains the reason the Energy Commission wrote the report. An introduction should give the relevant background and overview. It should define (at an intelligent layperson level) the issue or problem being addressed by the report.

As a report summary, the executive summary should not present new information that is not found in the main document, and the executive summary should not just repeat the abstract.

Do not cite references in the executive summary, and, with rare exceptions, do not use acronyms or abbreviations.

The executive summary uses the same “ALL CAPS” style that is used on preface and abstract titles.

The executive summary marks the division between front matter, using lowercase Roman numeral pagination, and the body of the report. Thus, the first page of the executive summary will always be page 1 (Arabic numbering) of the report.

Please note that the executive summary and the abstract are the only items in PIER research reports that are directly edited by the Energy Commission Media and Public Communications Office. The edits are done for clear understanding by the lay person of the subject matter and not for content. Other parts of the report are reviewed but are not edited unless egregious errors are noticed.

Chapters and Section Headings

Chapters should be numbered (CHAPTER 1:, CHAPTER 2:, etc. in upper case) followed by a colon, a shift-return (soft return), and then the chapter title in title case. Chapter number and titles should begin at the top of the page.

Use a soft return again [shift-return] if you need to break the title into two lines. Try to not leave orphaned words (words left alone). Instead use a soft-return to group words.

You do not need to capitalize the following words, unless they begin the title or a second line:

a an and by for or the

Example:

CHAPTER 1: How You Should Create Excellent Titles for Commission Reports

The example above is awkward because it orphans the word “Reports.” Break the line (with shift>return) to group common words together:

Good:

CHAPTER 1: How You Should Create Excellent Titles For Commission Reports

Better:

CHAPTER 1: How To Create Excellent Titles for Commission Reports

Best:

CHAPTER 1: Creating Excellent Titles for Commission Reports

The example marked “Better” uses a stepped format that is more pleasing to the eye, but the example marked “Best” is cleaner-looking and reads better.

DO NOT USE scientific or technical section numbering (Section 1.1, Section 2.1.6) for subheadings within chapters.

Numbering Headings and Subheadings

PIER research reports are the only Energy Commission reports that allow the use of scientific numbered headings and subheadings. The following is the format for numbering:

Heading 1 Chapter Titles: continue to use the one following the chapter instead of 1.0.

1.0 Heading 2: Subheading.

1.1 Heading 3: Sub-subheading

1.1.1 Heading 4: Sub-sub-subheading

Authors may use this scientific style of numbering for headings, or they may use the heading format that is found in this manual.

References

The references section at the end of the report must list all documents cited in the body of the report. List references in a standard alphabetical format. Use Palatino Linotype font, 11 pt. (or one of the other approved body fonts). Please check that all of the references contained in the body of the report are accurate and that the full citation for each reference is listed in the references section. Indent second and subsequent lines in citations by 0.5 inch.

For formatting of references, consult the following books:

Sabin, William A. *The Gregg Reference Manual (10th Edition)*. McGraw-Hill Irwin, 2005. ISBN: 0072936533.

Style Manual Committee, Council of Science Editors. *Scientific Style and Format: The CSE Manual for Authors, Editors, and Publishers (7th Edition)*. University of Cambridge, 2006. ISBN: 097796650X.

University of Chicago Press. *The Chicago Manual of Style (15th Edition)*. University of Chicago Press, 2003. ISBN: 0226104036.

List any documents referred to in the appendices in a reference section in that appendix; that is, each appendix carries its own references section.

For references within the body of the report, please see page 55.

Glossary

If the report uses more than 10 acronyms and abbreviations, please provide a glossary with definitions for each acronym. Use Microsoft Word table feature to create a two-column format with the acronym or abbreviation in the left column and the definition in the right column.

Bibliography

A bibliography includes references that were used in preparation of the report not cited in the report. This section is optional. If used, consult the same reference books mentioned in the references section, above, for formatting guidance.

CHAPTER 6:

Appendices and Attachments

An appendix is usually supplementary material that is produced by the report author or writing team. An attachment is usually **supplementary material that is produced by someone other than the author** that the author wishes to reference.

Important Note About Copyrights and Permissions

If an attachment or an appendix has been previously published, **the author must obtain written permission from the copyright holder before the Energy Commission can publish it or put that document on-line.**

You should ask for “written permission for electronic publishing of the document in Adobe Acrobat PDF format on the California Energy Commission website.” Make sure there is no time limit on the permission – that is, ensure that the file may be posted on the Energy Commission website indefinitely.

Send a photocopy of the written permission to the Energy Commission contract manager when you deliver the report and the appendix(ces) or attachment(s). Also please send a scan of that written permission as an electronic file along with the Word or other report files that are being delivered. That electronic, scanned version of the permission will be kept by the Commission Webmaster in the report archive.

Most previously published documents will be posted as separate documents, with their own cover pages. No credits page is needed for appendices or attachments not funded by the Energy Commission. On the cover page where the words “Prepared By” are located, please include the following statement:

Please Note: This document is an attachment to a report prepared/funded by the California Energy Commission. The Energy Commission did not prepare or fund this attachment, but the author(s) has/have requested it be available as a supporting document.

The Energy Commission wishes to thank the copyright holder, ***[fill in name of author and/or publisher or whomever holds the copyright]***, for permission to republish this document in electronic format on the Commission website.

Please contact the original author/publisher for additional information about the document at: ***[fill in company website address, phone number, and/or e-mail address]***.

Appendices

An appendix is supplementary material that is usually produced by the report author(s). Designate appendices by capital letters (Appendix A, Appendix B, Appendix C, etc.), not numbers.

The body of the report needs to refer clearly to the attached appendix. References in the main report to information contained in the appendix should indicate the specific page or section of the appendix, not just a general reference to “Appendix D.” The report should also explain how

the material in the appendices matters to the text. If it does not really matter, the appendix probably should be dropped.

Formatting and Editing of Appendices

Appendices should use the same Energy Commission-required formatting and style as the main report. If an appendix was previously published using a different style and format, that organization or other agency style and format do not necessarily need to be changed. Please contact Media and Public Communications Office for directions on appendices that were previously written.

The content and format of an appendix is subject to editing just like the report itself.

If small enough, appendices will usually be a part of the actual report. There are two formats for the appendix cover page. An appendix cover page should appear similar to what appears in **Figure 7** on the next page. The version on the left is the preferred because it saves paper.

Each appendix published as a separate volume must have its own cover page and publication number. If the Energy Commission funded the work, each separate appendix must also have a credits page. The Energy Commission provides the publication number when the report reaches the Media and Public Communications Office for review and sign-offs.

If the appendix has been previously published by another organization or agency with a different cover, it receives an Energy Commission cover page but no credits page. If the work contained in the appendix was not funded by the Energy Commission, be sure the cover page contains the boilerplate copyright permission language provided earlier in the “Copyrights and Permissions” section.

Appendices’ Publication Numbers

The publication number of an appendix consists of the main report publication number plus a suffix. If there is only one appendix, the suffix is -AP. If there are multiple appendices, the suffixes are -APA, -APB, -APC, etc., depending on the letter of the appendix. Therefore, the publication number for Appendix B of a fictitious report published in 2010 by the research division would be: CEC-500-2010-987-APB.

If multiple appendices are combined in one volume, then the suffix is only -AP with no additional letter.

Page Numbering of Appendices

Appendices page numbering should include the letter of the appendix followed a hyphen and then by the page number. The same conventions of page numbering used in regular reports is also used in appendices.

Example of page numbering: A-1, A-2, A-3; B-1, B-2, B-3; etc.

Appendices as Part of the Main Report

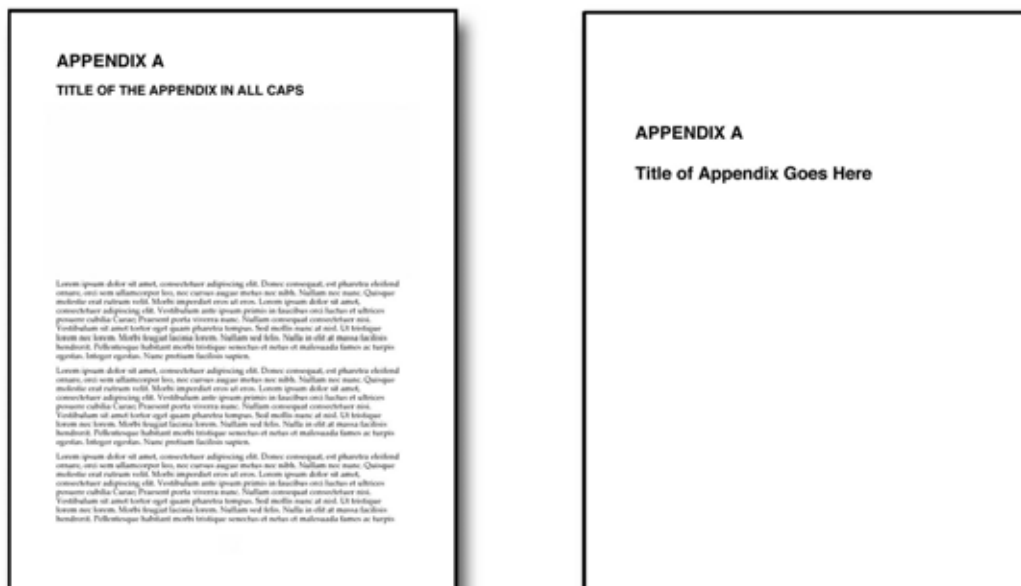
If the appendices are short enough, they may be included in the same Word file as the main report. If an appendix is very short and is a part of the report itself, the appendices can continue the page numbering used in the report.

The first page of each appendix should be a title page, containing the following information:

- The word “Appendix” (with letter A, B, or C, etc. if more than one appendix), in Arial 24 pt., bold, upper case.
- Title of appendix, in Arial 18 pt., bold, upper or lower case.
- A-1, A-2, A-3, etc. (or B-1, C-1, etc.), page numbering centered on the bottom of the page. Use Arabic numerals.

Figure 7 shows the format of what appendix title pages could look like.

Figure 7: Examples of Appendix as Part of Main Report



Appendices as Documents Separate From the Main Report

If the Word file created by an appendix is too large (more than 5.0 megabytes), it should be treated as a separate volume from the main report.

Where the appendix would normally go in the main report, insert a “slip sheet” that lists the following information:

- Appendix A (or B or C, etc.), in Arial, 24 pt., bold, then two returns.
- Title of appendix, in Title Case, Arial, 22 pt., bold.
- Text on the slip sheet saying: “This appendix is available as a separate volume, publication number CEC-XXX-YEAR-XXX-APX.”
- The slipsheet has no visible page number.

Please see **Figure 8** for an example of a “slip sheet” for a single appendix that is a separate volume.

If there is more than one appendix, the titles of each appendix should be listed on a single “slip sheet.” The title of the page, in that case, should be “Appendices” (Arial 24 pt., bold) with the appendix letters and titles, and their publication number(s), neatly arranged as a list. Please see **Figure 11** for an example of multiple appendices listed on a “slip sheet.”

If you have multiple small appendices, they may be combined into a single volume if the file size permits. If the multiple appendices create a file larger than five megabytes, then separate volumes should be created for each appendix. Appendices are posted on-line in Adobe Acrobat PDF format.

Figure 8: Example of a “Slip Sheet” for Appendix A



Figure 9: Example of “Slip Sheet” for Multiple Appendices in One Volume



Appearance in Table of Contents

When preparing the table of contents for the report, you may need to manually enter each appendix letter and title (or attachment number and title) into the table of contents. Contents of the appendix, however, are generally not included within the table of contents.

Attachments

Attachments are supporting documents that usually were not written by the author of the main report. An attachment may also be supplementary material that may not directly relate to the report. For example, attachments can include a collection of news articles that appeared on a certain topic.

Attachments are designated with Roman numerals rather than letters (Attachment I, Attachment II, etc.).

Most previously published documents will be posted as separate files, with their own cover pages. No credits page is needed for appendices or attachments not funded by the Energy Commission. On the cover page where the words “Prepared By” are located, please include the following statement:

Please Note: This document is an attachment to a report prepared/funded by the California Energy Commission. The Energy Commission did not prepare or fund this attachment, but the author(s) has/have requested it be available as a supporting document.

The Energy Commission wishes to thank the copyright holder, ***[fill in name of author and/or publisher or whomever holds the copyright]***, for permission to republish this document in electronic format on the Commission website.

Please contact the original author/publisher for additional information about the document at: ***[fill in company website address, phone number, or e-mail address]***.

Attachments are usually published separately from the main report. Prepare a single “slip sheet” and cover page(s) the same way as for appendices. Also include the attachment information in the report table of contents.

The Media and Public Communications Office will assign a publication number to each attachment. The publication number of an attachment consists of the main report publication number plus a suffix. If there is only one attachment, the suffix is -AT. If there are multiple appendices, the suffixes are -ATI, -ATII, etc., depending on the letter of the attachment. Therefore, the publication number for Attachment II of the same fictitious report published in 2007 by the Energy Efficiency and Renewables Division would be: CEC-400-2007-987-ATII.

In almost all cases, attachments will require permission to publish from the copyright holder. It is the report author responsibility to obtain this permission. You should ask the author or publisher for “written permission for electronic publishing of the document in Adobe Acrobat PDF format on the California Energy Commission website.” Make sure there is no time limit on the permission – that is, ensure that the file may be posted on the Energy Commission website indefinitely.

The permission language appears on the cover of the attachment in a box similar to below. Send a photocopy of the written permission you have obtained to the Webmaster when you deliver the report and the appendices or attachments. A copy of the written permission should be given to the Webmaster to be filed in the Media and Public Communications Office copyright approvals filing cabinet.

CHAPTER 7:

Preparing Accurate, Consistent Reports, And Report Content Styles

Before you begin writing, put on the hat of an inquisitive, reasonably well-educated lay reader. Pretend that he or she paid for this report and wants to understand how and why you spent the money. That's your intended audience. Even though colleagues in the energy industry may be the only people who read your report, you need to make the writing clear and understandable to a larger audience. Your reader may not speak or read English as a first language. So, you must write clearly and concisely.

Here are some suggestions to keep in mind as you write the report:

- Apply the test of completeness. Are all the pieces there? Are all the references clear and do those in the text match those in the reference section? Are the relationships between the partners and the players clearly explained?
- Apply the test of logic. Does the document flow and make sense? Is the need for the research clearly described? Is the technical approach clearly described? Do the conclusions make sense? Are they drawn from the analysis? Do the numbers check? Is it clear how the numbers were derived?
- Analyze data that you present in the report. If you present a picture, *graph*, or table, be sure that you discuss it in the text; do not just refer to it. Remember, not everyone wants to or can print in color, so it is best if your graphic can also be copied in black and white. Apply the “would this be clear if it were faxed” test.
- Make sure you substantiate each conclusion by the analysis contained in the report.
- Figures and tables must clearly relate to and be consistent with the text, and vice versa. (If the text says the generator had a capacity of 30 megawatts, the table should not say it was 31.2 megawatts.)
- Use consistent references to report performance specifications and results. For example, if you refer to a piece of equipment by its nominal nameplate rating, then use that reference consistently throughout the report. If, however, the desired number was the measured performance of the device (almost always different from nameplate), then consistently use that measured number. Do not mix the two in the narrative.
- The text needs to clearly refer to the attached appendices (if applicable). It should also explain how the material in the appendices relates to the text. If the content does not really matter, you should probably drop the appendix. References to multi-page appendices need to be specific to the page or section of the appendix, not just a general reference to “Appendix B.” Number appendices’ pages consistently.

Apply general rules for good writing to all reports and other written materials created or funded by the Energy Commission. The following books are recommended to assist authors in developing good writing habits:

Sabin, William A. *The Gregg Reference Manual (10th edition)*. McGraw-Hill Irwin, 2005. ISBN: 0072936533.

Fiske, Robert Hartwell. *The Dictionary of Concise Writing: 10,000 Alternatives to Wordy Phrases, Second Edition*. Marion Street Press, 2006. ISBN: 1933338121.

Strunk Jr., William, E. B. White, *The Elements of Style, The Original Edition*. www.bnpublishing.com, 2008. ISBN: 9562919897.

Style Manual Committee, Council of Science Editors. *Scientific Style and Format: The CSE Manual for Authors, Editors, and Publishers (7th Edition)*. University of Cambridge, 2006. ISBN: 097796650X.

University of Chicago Press Staff (Editor). *The Chicago Manual of Style (15th Edition)*. University of Chicago Press, 2003. ISBN: 0226104036.

The above books may disagree on grammar and punctuation formatting, such as using a “serial” comma. The Energy Commission preference is the *Gregg Reference Manual*. We recommend that each office have at least one copy of that manual.

If you have a question about what the report should include, contact the Media and Public Communications Office to discuss the report. Make sure you understand all the required parts.

Writing Style

- Use the **active** voice whenever possible:
ACTIVE VOICE: The petroleum industry builds new storage facilities.
PASSIVE VOICE: New storage facilities are built by the petroleum industry.
- The Energy Commission discourages the use of the first person (I, we, us, our) when referring to the author(s) in its reports. This is not to say that you should write in the passive voice. It is possible to write in the third person and still write in the active voice. For example:
 - Instead of third person passive voice: “It was found by the research team, or it was found by the researcher that...”
 - Use third person active voice: “The research team or the researcher found that...” or “The study found that...” or “Results showed that...”
- Writing in the third person requires that the authors refer to themselves as though they were referring to a third party:
 - First person: “We considered 12 different scenarios...”
 - Third person: “The authors [or “the research team” or “the researcher” or “this project” or some other similar third-party reference] considered 12 different scenarios...”
- Eliminate excess words. For example, say “To calculate the emissions...” NOT “In order to calculate the emissions....” *The Dictionary of Concise Writing* can help writers use fewer words to convey their message. For example, say, “The team analyzed ...” and not “The team conducted an analysis of ...”

- Avoid using “etc.,” “e.g.,” or “i.e.” Instead, use “and so forth,” “for example,” or “that is,” respectively, or another appropriate substitute.

Acronyms and Abbreviations

An acronym is an abbreviation made up of the initial letters of a group of words and is pronounced as a single word. For example, HVAC (heating, ventilation, and air conditioning) is pronounced H-VAC. Abbreviations are the initial letters of a group of words but cannot be pronounced as a single word and in which each letter is spoken individually, such as CPUC and PG&E. The Energy Commission uses these two terms interchangeably, most often including abbreviations under the umbrella of acronyms.

Use acronyms sparingly! They are a form of shorthand for terms used repeatedly that are familiar to your readers. Don’t make up your own acronyms. This style of writing excludes the reader by introducing words that are only known to a “select few.”

An acronym should benefit the reader, not cause them to stop reading and start hunting for the first time the acronym was used. Acronyms may be disallowed at the discretion of the Energy Commission editors.

Follow these rules when using acronyms or abbreviations.

- Do not make up acronyms as shorthand for a group of words.
- Do not use the abbreviation “CEC” in reports or in other written materials, except if used in a table heading where space is critical. Use “California Energy Commission” at first mention, and then use “Energy Commission” throughout the rest of the report. You may use just “Commission” in subsequent references in the same paragraph as long as no other commissions are being mentioned. Return to using the full two words Energy Commission in subsequent paragraphs.
- Introduce acronyms by first using the full term, followed by the acronym in parentheses. Energy Commission style does not allow the use of acronyms in the abstract and executive summary because these sections may need to stand alone and because these elements are often read by a broader audience that may be less familiar with the subject matter. Very common acronyms or abbreviations are acceptable in abstracts and executive summaries. (See Table 1.)
- Do not introduce and use an acronym if it only appears once or twice in close proximity. Rare exceptions would be cases where readers are more familiar with the acronym than its actual referent.
- Do not use the U.S. Postal Service two-letter abbreviations for states in the United States. Instead, use the full state name (example: Sacramento, California).

Table 4: Common and Acceptable Acronyms and Abbreviations

Original Term	Acronym/Abbreviation
California Energy Commission	Energy Commission – do not use CEC
British thermal unit	Btu
California Air Resources Board	ARB (not CARB)
California Department of Water Resources	DWR
California Environmental Protection Agency	Cal/EPA (use a slash mark between Cal and EPA)
California Independent System Operator	California ISO (not CAISO or Cal-ISO)
(California) Public Utilities Commission	CPUC
carbon dioxide	CO ₂ or CO2 (Note: Make sure the 2 it is not too small to read.)
cubic feet per minute	CFM
(United States) Department of Energy	U.S. DOE
Energy Action Plan	Energy Action Plan (not EAP)
Energy Efficiency Ratio, Seasonal Energy Efficiency Ratio	EER, SEER
ENERGY STAR [®]	ENERGY STAR [®] on first reference with registered trademark in superscript, followed by ENERGY STAR thereafter. Note: Can be all capitals.
Federal Energy Regulatory Commission	FERC
gigawatt / gigawatt-hour	GW / GWh
greenhouse gas	GHG
heating, ventilation, and air conditioning	HVAC
<i>Integrated Energy Policy Report</i>	<i>IEPR</i> (Italicize because it is a title of a report)
kilovolt	kV
kilowatt / kilowatt-hours	kW (small k, capital W) / kWh
liquefied natural gas, liquefied petroleum gas	LNG, LPG
Los Angeles Department of Water and Power	LADWP
MCF	MCF but in parentheses say (1000 cubic feet of natural gas)
megawatt / megawatt-hour	MW (all capitals) / MWh
nitrogen oxides	NO _x or NO _x
Nuclear Regulatory Commission	NRC
Organization of Petroleum Exporting Countries	OPEC
Pacific Gas and Electric Company	PG&E
photovoltaic	PV
Public Interest Energy Research Program	PIER Program
one quadrillion (10 ¹⁵) British thermal units	Quad
research, development, and demonstration	RD&D
Sacramento Municipal Utility District	SMUD
San Diego Gas & Electric <i>Note: An ampersand is the correct usage in the company name.</i>	SDG&E
Southern California Edison Company	SCE
Southern California Gas Company	SoCal Gas
sulfur oxides	SO _x
United States	United States (not U.S. unless it proceeds an abbreviation for a federal agency)
United States Environmental Protection Agency	U.S. EPA (not EPA)

Bulleted Lists

Consider using a bulleted list for complicated sentences like the following example:

This report provides policy recommendations to conserve resources; protect the environment, the economy, and public health and safety; and ensure reliable, secure, and diverse energy supplies.

The above is correct, but it is clearer if bullets are used.

This report provides policy recommendations to:

- Conserve resources.
- Protect the environment, the economy, and public health and safety.
- Ensure reliable, secure, and diverse energy supplies.

Note: *Gregg Reference Manual* (p. 106) states: “...use periods after short phrases that are essential to the grammatical completeness of the list.”

In the above example, you should not use semicolons at the end of the first and second bullet. Nor would you put the contraction “and” at the end of the second bullet. The above bulleted items are incomplete sentences on their own, but because they grammatically complete the lead-in phrase, periods are used.

Rule for Bullets

If a bullet makes a complete sentence or completes the lead-in, put an end mark. If not, no end punctuation should be used.

In bulleted lists, use “parallel construction” for the items in your list. For example, if one item starts with a verb, all items should start with a verb; if one item begins with a noun, all items should begin with a noun, and so forth.

Use the following guides for punctuating bulleted lists:

- Start each bulleted element with a capital letter.
- Place a period at the end of each listed element that is a complete sentence.
- Incomplete sentences should not have a period unless they are “essential to the grammatical completeness of the list.” (See note above.)
- Semicolons or commas should not be used as end marks.
- The word “and” should not end the second to the last bulleted item.

Do not use small graphic files in place of the standard bullets.

Format for Bulleted Lists

1) The hierarchy for bullets should be:

- Bullet item (round, solid disc)
 - Second level bullet (open circle)
 - Third level bullet (solid square)
 - Fourth level bullet (hyphen)

2) Add an additional return (extra line) at the end of the bullets and before the next paragraph.

3) Bullets use standard /normal text (Palatino, 11 pt.) but should only have a 4 pt. spacing following the paragraph. It is included in the blank document template, but you may have to change this manually. To do that, highlight the bulleted section, go to pull-down menu:

Format>Paragraph>Indents and Line Spacing>Spacing After = 4 pt.

4) Always format bullets with a hanging indent, indenting 0.25-inch from the line above with the hanging indent at 0.50-inch from the line above.

Capitalization

Do not capitalize words to make them stand out in a text. For example, “The Department offered its services.” is incorrect and should be “The department offered its services.”

Just because acronyms and abbreviations are most often capitalized does not mean that you must capitalize the terms when they are written out. For example, you would not capitalize heating, ventilation, and air-conditioning (HVAC) system prior to listing the acronym in parentheses.

Do not capitalize words in the following situations:

- Do not capitalize “state” unless the text specifically says “the State of California” or unless state is being used as a noun.

Examples:

The State is considering adoption of new regulations.

New state regulations are being considered.

- Use “energy crisis”, NOT “Energy Crisis.” A proper noun, however, like “2001 Energy Crisis” would be capitalized.
- Use the lower case for “project” or “program” or “model” unless the term is an official part of a name or title, such as “Sunrise Transmission Project” or the “PIER Program” or the “Cost of Generation Model.” (In subsequent references to the project or program or model, use the lower case for the term even though it capitalized when you use the official name. For example, regarding the Sunrise Transmission Project, subsequent mentions would be to “the project” if you don’t want to use its full name.)
- Use “website” (all one word, lowercase) and not “Website” or “web site.” However, use “Web page,” “Webmaster,” and “the Web.” Per *The Gregg Reference Manual*, to maintain a consistent style, it is better to retain the capital “W” until a majority of these terms

(such as “World Wide Web”) lose their initial cap as well. Website, however, has lost the initial cap in most technology publications, newspapers, and websites.

- Do not capitalize “city” before the name of a municipality unless it is part of its formal name. For example, “city of Sacramento,” not “City of Sacramento.” The actual name of the city is Sacramento, California. For some cities, the word “city” is part of its formal name, such as the City of Industry, California.
- Do not capitalize any term that is not a proper name or title.
- Do not capitalize “staff.”

Words that **should** be capitalized are:

- Governor, Legislature, Senate, and Assembly (when pertaining to California).
- Northern California, Southern California, Central California, the State (when used as a noun as a stand-in for State of California).

Please note that the terms that are capitalized may disagree with some grammar conventions. These are Energy Commission style for using these terms.

Adjective Phrases and Adverbs

Don't hyphenate **adjective phrases**: “publicly owned utilities,” or **adverbs**: “newly created.”

Compound Adjectives

Many compound **adjectives** are hyphenated when they come before a noun: “investor-owned utilities.” They are not hyphenated when they come after the verb: “The utilities are investor owned.”

Internet and E-mail Addresses

You can configure Microsoft Word to automatically create hotlinks to Internet addresses (URLs, short for Uniform Resource Locator) and a mail-to link for e-mail address. Creating the hotlink changes the text to blue and underlines the text (in Word default settings). When a user clicks on the link, the text color changes to purple. Changing the Word file to Adobe Acrobat sometimes incorporates the hotlinks. Please make sure the addresses are correct and tested before submitting a report.

Note: E-mail should be spelled with a hyphen and not as email.

Try not to split Internet addresses across two lines. If you need to, put the website address on a separate line, centered. Or if the URL is still too long, reduce the point size. For example:

<http://www.energy.ca.gov/2007publications/CEC-180-2008-001/CEC-180-2008-001.PDF>

http://www.energy.ca.gov/2007_energypolicy/notices/2007-08-16_workshop_notice.html

Italics

Italicize the name of all books and reports. For example, use *2007 Integrated Energy Policy Report* and *2008 Energy Policy Report Update*. Do not underline. If the information cited is from a magazine, put the article title in quotations and the magazine name in italics.

Use italics, not quotation marks, to introduce new technical terms. Include such terms in a glossary, if appropriate.

Language of Report

When writing the report, use American, not British, English.

Legislation

(Referencing Legislation in Energy Commission Documents)

For consistency, the following format should be used when referencing all legislation in reports or other documents:

Bill # (Author, Chapter #, Statutes of “year”)

Example: Senate Bill 1 (Murray, Chapter 132, Statutes of 2006)

After that first reference, reference the bill as an abbreviation (SB 1) unless it has a formal title.

If a bill has a formal title, the first reference should include the formal title followed by the bill information. For example:

Petroleum Industry Information Reporting Act (Senate Bill 1444, Holmdahl, Chapter 1055, Statutes of 1980)

After that first reference, reference the bill as a shortened title (PIIRA or whatever the act is commonly called).

Numbers

In a list in linear text, use numbering (in parentheses) to indicate the order in which tasks should be done, to suggest chronology or relative importance among the items, or to clearly separate the items. For example:

When repairing the machine, the researchers: (1) gathered the parts, (2) assembled the subsystems, (3) connected the subsystems, and (4) conducted tests to establish baseline performance.

When establishing the policy, the State considered (1) wind turbines, both old and new; (2) energy conservation programs that encourage consumers to reap the benefits of off-peak electricity; and (3) photovoltaic installations—including emerging technologies that use thin-film materials—in regions with superior insulation.

Otherwise, do not use numbering, as in the following example:

There are three key drivers of natural gas prices: supply, demand, and storage capacity.

It may be clearer, however, to use numbered bullets instead of a list in linear text.

Here are other rules for numbers:

- Use numerals for 10 and above; spell out all numbers one through nine, EXCEPT when indentifying:
 - Percentages (2 percent)
 - Dates (June 2, 2005)
 - Page numbers (page 6)
 - Chapter numbers (chapter 4)
 - Energy increments (1 megawatt, 9 kilowatts)
 - Sentences that include a list of identical items, some of which are fewer than 10 and some are more: “We ran 2 trials in April, 5 in May, and 14 in June.”
 - Table and Figure numbers (Table 4, Figure 6)
- Always use commas in numbers that are five digits or larger: 12,400, 245,678.
- Insert commas four-digit numbers when they are used in tables or columns and are optional in text, unless needed to make the number clear.
- Never begin a sentence with a numeral, including a year. “The energy crisis began in 2000,” NOT “2000 marked the year the energy crisis began.”
- Always use a zero before a fraction smaller than 1.0. Use 0.25, not .25.
- Treat related numbers alike:
Last year we sold 21,557,000 items; this year, nearly 23,000,000.
- Repeat the word million (billion, etc.) with each figure to avoid misunderstanding:
\$5 million to \$10 million (NOT: \$5 to 10 million).
- Use the metric system (International System of Units, or SI) or English units—whichever is most appropriate to the report. When referring to temperatures, however, use Fahrenheit along with Celsius following in parentheses—for example, 212°F (100°C). Note that there should not be a space between the temperature, the degree symbol, and the letter. For executive summaries, use both SI and English units of measurement, to support a greater understanding by a lay audience. Use of other standard English measures (e.g., acre-foot, two-by-fours) is always appropriate.

Page Breaks

If a subheading is at the bottom of the page, but the text jumps to the next page, put a page break before the subheading. Including a page break will ensure that headings are not left alone at the bottom of a page with no content if the Word file is opened on a different computer.

Percentages

Always spell out the word “percentage” instead of using the % symbol except when used in a chart or graph. For example:

- The U.S. Labor Department reported that September unemployment rate fell 0.2 percent.
- The sales tax rate in California can vary from 7.0 to as much as 8.5 percent. Fifty years ago, the tax rate was 2.5 percent. It increased to 3.5 percent four decades ago. It has never gone down.
- It is permissible to use the % symbol in graphs and charts.

Punctuation

Apostrophes and Quotes

Use “smart” (also called curly or typographic) quotes (“ and “) and apostrophes (‘). These quote marks and apostrophes have a slight angle to them to distinguish them from the inch- and foot-mark.

Brackets

Use brackets for parenthetical material within parentheses. (Within the parentheses, separate the text [parenthetical material] from the rest of the sentence.)

Colon and Semicolon

Use only one space (not two) after a colon or a semicolon.

Commas

Use a serial comma style throughout the report.

Example: The research team tested the first, second, and third models.

Note: The comma after “second” is called the serial comma and separates the terms in a simple series.

In a serial list that has multiple units in each element of the list, use a semicolon instead of a comma to clarify groupings.

Example: The breakfast menu items were coffee, tea, fruit juice, or milk; bacon and eggs; cold cereal and milk; hot oatmeal with cinnamon, apples, and cream; assorted sweet rolls; or fresh fruit and yogurt.

Use commas to set off the main elements in an address or a title following a person name.

Example: The Energy Commission has been located at 1516 Ninth Street, Sacramento, California, for more than 20 years.

Example: Mary Jones, director of the project, is in charge of the contract.

Commas in Dates

Do not put a comma between a month and a year (July 2007), but do put a comma between a date and the year and after the year if in a sentence.

Example: The Declaration of Independence was signed on July 4, 1776, in Philadelphia, Pennsylvania.

Note: Use the standard American method of dating of month, date, and year.

Hyphen (-), En Dash (–), Em Dash (—)

When in doubt about whether to hyphenate a word, look it up in the dictionary or the *Gregg Reference Manual*. Words with the prefix “non”, “anti”, “pre”, “pro”, “multi”, “co” are not hyphenated, except when “non” is used with a proper noun, such as non-English.

Words with a prefix that ends in the same letter as the root word are hyphenated.

Example: She suffered from a pre-existing condition.

Use for any set of words you want understood as one unit, but use them sparingly.

Example: It was an out-of-date idea.

Use to join compound modifiers, unless one of the words is an adverb ending in “-ly.” Compound modifiers are two or more adjectives or adverbs that, if used separately, do not describe the word they modify:

- The utility offers consumers many energy-saving ideas.
- She was a newly elected senator. (“-ly” adverb, no hyphen)

Use an **em dash** (—) between a range of numbers. From the Insert Menu, select Symbol > Special Characters > em dash.

Use an **en dash** (–) instead of a double hyphen (- -). Add a space before and after the en dash. From the Insert Menu, select Symbol > Special Characters > en dash.

Percentage Symbol

Spell out the word “percent” if there is only a single reference to a percentage.

Example: The state and local sales tax in the area was 7.75 percent.

If there are multiple references within a sentence or paragraph, do not use the % symbol.

It is permissible to use the % symbol in graphs and charts.

Period Spacing

Use a single space after a period. Do not double space. If you've used double spaces, use the find and replace function in Word to find double spaces and replace them with single spaces.

Quotation Marks (“ ”)

Use around titles of chapters, sections, article titles, or a coined word or phrase.

- We read the chapter “Progress in Energy Programs,” from the *Energy Efficiency Report: 1998*.
- The staff reviewed the “widget” design.

References Within the Report Body

When referencing a report, book, or other document within the body of the report, use the format as describe in *The Gregg Reference Manual, Tenth Edition*.

Referencing is referring someone to the source. References (also called "citations") show the reader what different aspects of your work are based on. Insert the reference in brackets to lead the reader to information about the page of a book or other source that is the evidence for what you have said.

For example: When you see a reference, like this: **(Aldrich, B. 2009 p.23)**, in the text of a report, it means that you are being referred to page 23 of a book written by B. Aldrich in 2009. To find out the title and publisher of the book, you look in the bibliography.

Special Characters and Symbols

Microsoft Word has a listing of special characters that you can use when typing. To view the special characters, go to Insert > Symbol. These special characters make use of the “Symbol” typeface that comes with and is installed by Microsoft Word. These special characters are the same across computer platforms. For symbols that are not in the standard typeface or font family, please contact Media and Public Communications Office to discuss using them in a report.

Underlining

Do not use underlines. Use **bold** or *italics*.

Do not use underlines to differentiate a header or section. Use the style setting for that heading.

CHAPTER 8:

Word Use and Misuse

The following words are those most misused in Energy Commission documents. For more information on usage, check *The Gregg Reference Manual* or *The Dictionary of Concise Writing*.

accessible /assessable – A location is wheel chair accessible. A house is assessable by the county tax collector.

additionally – also; and; as well; besides; beyond that (this) even; further; furthermore; moreover; more than that (this); still more; then; too; what is more.

adopted, approved, passed, enacted – Amendments, ordinances, resolutions, and rules are adopted or approved. Bills are passed. Laws are enacted.

adviser, advisor – The California Energy Commission uses a Public Adviser, not an advisor, but the Commissioners have advisors.

affect, effect – “Affect” is a verb that means to change or influence. “Effect” is typically a noun that means the result.*

Correct: The oil spill affected marine life for months afterward.

Correct: The effect of the oil spill on marine life was devastating

* Although affect can be a noun, we hardly ever use it at the Energy Commission. Effect can also be a verb, but we rarely use it.

aid, aide – Aid is assistance. An aide is someone who serves as an assistant.

airborne – spelled with an “e” at the end.

air quality management plan/district – Use lower case unless referring to a specific plan or a specific agency.

assistance – aid, help, succor

assure, ensure, insure – “Assure” means to promise. “Ensure” and “insure” are often used interchangeably, but use “ensure” for more general meanings for “to make certain.” Reserve “insure” for legal and financial matters.

back up / backup – Use back up when it is a verb. For example: They will need to back up their computer in case of a power failure. Use backup when it is an adjective or a noun. For example: The backup generator has failed.

baseload – one word, not two words.

because of, due to – Use “because of” to match cause to effect. “Due to” is an adverb, which can be used when preceded by a linking verb. See examples.

Correct:

Because of the plants’ lower efficiency, which makes them less competitive, some parties remain concerned that a significant portion of these plants would be retired in the near future.

Some parties are concerned that a significant portion of these plants would be retired in the near future due to the lower efficiency of these plants that makes

them less competitive. (Although correct, please note how this sentence is wordy and lacks emphasis.)

Incorrect:

Due to their lower efficiency, some of these plants are less competitive, and some parties are concerned that a significant portion of these plants would be retired in the near future.

before – Use “before”, not “prior to”.

benchmark – one word, not two words.

BLM – The U.S. Bureau of Land Management prefers “the BLM” when using the acronym. Always spell out upon first use.

brand names – Do not use brand names to describe a process unless that process is being used. The same is true for other common brand names, such as Scotch® tape, Kleenex® tissues, and Coke®. Always capitalize brand names.

brief (concise, short, succinct) summary or synopsis – Just say “summary” or “synopsis.” Adding one of the adjectives listed would be redundant.

Cal/EPA – California Environmental Protection Agency uses a slash between Cal and EPA in its acronym.

call into question – challenge, contradict, dispute, doubt, question.

Cal/OSHA – The acronym for Department of Industrial Relations Division of Occupational Safety and Health (DIR/DOSH), better known as Cal/OSHA.

capitol, capital – The word “capitol” refers to the buildings in, for example, Washington, D.C., and Sacramento. The word “capital” means the city where the seat of government is located. Do not capitalize it. Used in a financial sense, capital refers to money, equipment, or property. For example:

- The State Capitol is located near the Energy Commission.
- The Energy Commission is located in the state capital.
- They had the necessary capital to underwrite the project.

city – Do not capitalize unless the word city is a formal part of a city name. For example:

Correct: The mayor of the city of Sacramento dedicated the new power plant.

Correct: The City of Industry has the word “city” as part of its formal name.

CO₂ – Abbreviation for carbon dioxide. Spell out first usage. The 2 should be in subscript. You may need to increase the font point size for the subscript so it is readable.

combined cycle – Do not use a hyphen between the words. For example: a combined cycle power plant.

concurrently – as one; at once; jointly; together.

contractions – Do not use contractions in external Energy Commission reports, notices, and letters.

contrary to – after all, apart (from).

currently – now, today. (Note: If sentence uses present tense, you may not have to use the adverb.)

data/datum – “Data” is plural. “Datum” is the singular form.

effectuate – achieve, bring about, carry out, effect, execute, realize.

e-mail – The word e-mail is not capitalized unless it begins a sentence. The word should be hyphenated as e-mail and not written as email.

emissions performance standards – Use lower case .

entitled – Use “title.”

environmental impact report/statement – Use lower case in all instances.

equally well – The word “as” is not needed between equally and well.

eventuality – event, occurrence, outcome, delete.

- Kodak should have prepared for this eventuality.
- Kodak should have prepared for this outcome.

expenditure – cost, expense.

facility – bathroom, building, factory, hospital, jail, office, place, plant, prison, school.

farther, further – The two words are commonly interchanged, but there is a distinction worth observing: farther serves best as a distance word, further as a time or quantity word. You can chase a ball farther than the other fellow; you pursue a subject further.

FAX (all capitals) is the approved substitute for facsimile transmission.

federal: Capitalize “federal” only at the beginning of a sentence and for corporate or government entities that use the word as part of their formal names, such as Federal Express and Federal Trade Commission.

first introduced – introduced.

gas-fired – Hyphenate if attributive adjective. For example: A gas-fired power plant.

gigawatt-hours – Use hyphen before the hours. Abbreviation is GWh.

given the fact that – because, considering, for, given, in that, since, when.

government – Capitalize “government” only at the beginning of a sentence and never abbreviate it.

Governor – It should be capitalized at the beginning of a sentence, when used as a stand-in formal title (“The Governor signed the bill....”), or before a governor’s name (Governor Schwarzenegger signed the bill....). Do not abbreviate in any usage.

historic – Almost always correct to use historic instead of historical unless occurring in or relating to history, such as “historical data.” Both words use “a” and not “an.” For example: A historic event.

Homepage – Homepage is one word and is always expressed with a capital "H."

hopefully v. hope – Hopefully means “in a hopeful manner.” Use hope in most instances.

however – The *Associated Press Style Manual* suggests that you not begin a sentence with the word “however.” Although the Media and Public Communications Office adheres to this principle in usage, it is one area where experts disagree. *The Gregg Reference Manual*, for example, notes this disagreement and concludes that the writer must determine where to place such a transitional expression.

imply, infer – “Imply” means to suggest; you imply something by your own words or actions. “Infer” means to assume, to deduct, or to arrive at a conclusion; you infer something from another person words or actions.

impact – A strong word, impact denotes a forceful impingement, a collision, a violent communication of force. Often it is used when all that is intended is effect or influence, as in this example: “One of the questions raised by the Mayor attack on the Governor is its impact on their collaboration to give Sacramento an opportunity to vote on a new charter this year.” If the term environmental impact is quoted from a report, then it may be used in that context. Otherwise, environmental effect, environmental damage, or affect the environment are preferable.

importantly – Avoid by rephrasing.

Incorrect: More importantly, he paid for the damages.

Correct: What more, he paid for the damages.

Incorrect: With the breeze freshening, he altered course to pass inside the island. More importantly, as things turned out, he tucked in a reef.

Correct: With the breeze freshening, he altered course to pass inside the island. More important, as things turned out, he tucked in a reef.

in advance of – before.

in agreement with – according to, by, following, in keeping with, in line with, in step with.

in excess of – above, better than, beyond, faster than, greater than, larger than, more than, over, stronger than.

in force and effect – active, at work, effective, in action, in effect, in force, in play, working.

in order that – for, so, so that, that.

in order to – to.

in place of – for.

in response to – after, because of, by, due to, following, for, from, in, out of, owing to, through, with.

in short supply – meager, rare, scant, scarce, sparse.

in sufficient number or quantity – enough.

in terms of – about, as, for, as to, by concerning, for, in, of, on, regarding, respecting, through, under, with, delete.

in the vicinity (of) – close by, close to, near, nearby.

initially established – established.

Internet – Internet is always expressed with a capital "I."

irregardless – “Irregardless” is non-standard English. Use “regardless.”

is compliant with – complies with.

is subject to – depends on, hinges on.

it’s, its – Do not confuse “its” with “it’s”. “Its” is the possessive form of the third person, singular, neuter pronoun “it”. “It’s” is a contraction of “it is” or “it has.”

jargon – Do not use jargon in Energy Commission documents. The audience of your document may not understand technical jargon, and street jargon may demean your audience or your document.

kV – Abbreviation for kilovolt. Capitalize the V.

locality – area, city, district, locale, place, point, region, site, spot, state, town, zone.

MVA – Abbreviation for megavolt ampere.

MW – Abbreviation for megawatt.

megawatt-hours – Use hyphen before hours. Abbreviation is MWh.

memorandum of understanding – agreement.

methodology – method. When developing estimates of market size, data extrapolation methodologies may be useful. When developing estimates of market size, data extrapolation methods may be useful.

Note: When discussing a set of methods or procedures used, then “methodology” is appropriate. If it only one method, use method.

minimal – brief, least, lowest, minor, not much, scant, short, slight, smallest.

minimize – decrease; lower; reduce.

mitigate – moderate, soften, lessen, reduce.

move forward – advance, continue, go on, happen, move on, occur, proceed, progress.

non- – Most words with the prefix *non* are not hyphenated unless the base word begins with an *n*, as in non-native.

NO_x – Acronym for oxides of nitrogen. The *x* is done in subscript. Note that oxides of nitrogen is different than nitrous oxide, which is “laughing gas.”

occur – “Occur” refers to an accidental or unscheduled event. “Take place” refers to a planned event. An accident cannot “take place,” nor can a business meeting “occur.”

off site – Predicative adjective. For example: The meeting is located off site.

off-site – Attributive adjective. For example: It is an off-site location.

on a regular basis – bimonthly, biweekly, daily, hourly, monthly, regularly, weekly, yearly.

ongoing – All one word. For example: The discussions were ongoing.

online – For Internet items, all one word. Do not hyphenate.

on-line – For a power plant that is connected to the grid and producing power, use a hyphen. For example: The power plant is on-line.

open to the public – public. "The Energy Commission business meeting is public."

operational – active, live, running, working.

over – "Over" means physically above. If you mean a greater amount or quantity, **use "more than"**.

owing to the fact that – because, considering, for, given, in that, since.

percentage point (unit) – Say "point". Example: The U.S. Labor Department reported that the September unemployment rate fell 0.2 points, to 5.4 percent.

policy maker – "Policy maker" is two words, not one.

power plant – "Power plant" is two words, not one.

preventative – preventive.

principal, principle – "Principal" refers to someone who is first in rank or authority or describes something that is first in rank or authority.

- He was the principal of the school.
- It was the principal reason for the part failure.

"Principle" means truth, doctrine or rule of conduct, such as an uncompromising principle of honesty.

prior to – Use "before".

pursuant to – Do not use. Use: by, following, under, as directed by.

raise questions about (on) – challenge, contradict, dispute, doubt, question.

ratepayer – "Ratepayer" is expressed as one word. Bill payer and other similar words, however, are not.

regardless of the fact that – although, but, even though, still, though, yet.

remains to be seen – do not know, is not (now, yet) known, is uncertain, is unclear, is unknown, is unsure.

right-of-way – Use hyphens between words. Plural is rights-of-way.

SF₆ – Abbreviation for Sulfur Hexafluoride. The 6 should be in subscript.

simple cycle – Two words not hyphenated. For example: A simple cycle power plant.

split infinitive – There is a precedent since the 14th century for interposing an adverb between to and the infinitive it governs; avoid the split infinitive unless the writer wishes to place **unusual stress** on the adverb.

Incorrect: to diligently inquire.

Correct: to inquire diligently

staff – “Staff” is a singular noun and requires a singular verb. It is also called a collective noun, but it is used as a single unit.

Wrong: Staff are involved in the project.

Right: The staff is involved in the project.

Right: The staff members give regular updates and participate in briefings.

state – Capitalize when it stands in place of the State of California and is used as a noun. Do not capitalize if used as an adjective.

Right: The State will consider adopting new regulations.

Right: The state employees were ready to bargain on their contract.

state names – Spell out the names of the 50 U.S. states when they stand alone in textual material. Any state name may be condensed, however, to fit typographical requirements for tabular materials.

statue and statutes – “Statue” is a likeness sculptured, modeled, or cast into a solid substance. “Statutes” pertain to decree in law.

switchyard – One word, not two.

take into account – allow for, consider, provide for, reckon with, regard, weigh.

that is – delete.

Incorrect: This relates to the cost that is incurred by start-up firms.

Correct: This relates to the cost incurred by start-up firms.

there’s / there are – Do not use the contraction “there’s.” In most instances, there will be a subject-verb disagreement, and it will be misused.

Incorrect: There’s many ways to approach the problem.

Correct: There are many ways to approach the problem, but there’s only one correct way.

time frame – Two words not one word.

under – “Under” means physically below or underneath. If you mean a lesser amount or quantity, use “less than.”

unique – Unique things are one of a kind. Don’t say “very” unique.

unproven – unproved.

USACE – Correct full abbreviation for United States Army Corps of Engineers.

U.S. DOE – Correct full abbreviation for United States Department of Energy. U.S. Department of Energy is also approved for first usage. Abbreviate as DOE afterward.

USFWS – Correct full abbreviation for United States Fish and Wildlife Services.

utilize or utilization – use.

we – Do not use first person (we, us, or they) or third person (they, them, their) in reports, notices, or formal letters when referring to Energy Commission staff or the State of California.

Webmaster – Webmaster is one word and is always expressed with a capital “W.”

website – The term is one word, lower case.

whether or not – if, whether

who – “Who” and “that” may refer to persons. Use “who” when referring to individual persons. Use “that” when referring to groups, types, classes of persons.

which – “Which” and “that” refer to places, objects, animals, things, and others. Use “which” for nonessential clauses. Set off “the which clauses” with commas. Use “that” for essential clauses. Do not use commas.

Nonessential words, phrases, and clauses are not needed to complete the structure or meaning of a sentence. Nonessential elements supply supplemental, parenthetical, nice-to-know information.

The report, which was completed and submitted on time, still requires substantial revision.

Essential words, phrases, and clauses are needed to complete the sentence. They cannot be removed from the sentence because they provide need-to-know information.

The report that the contractor submitted is complete, but the report that staff prepared will need additional work.

you and I – The phrase should be: “It’s between you and me.” It should not be: “It’s between you and I.” Me is correct because it is the object of the preposition between. It is correct to say, “You and I are going to the store.”

CHAPTER 9:

Submitting Files to the Contract Manager and Media and Public Communications Office

The Energy Commission uses the Microsoft Office suite of software programs for word processing, spreadsheets, and presentations.

When submitting reports to the contract or project manager to eventually send to the Media and Public Communications Office, please send all files relating to the document, including original figures and graphic files. That way, the Energy Commission will be able to replicate the document in the future or convert it into future publication formats (such as XML) as technology changes.

Word and PDF Files

Send copies of the full documents as Microsoft Word **.doc** files. These may be combined into one file or sent as separate files. Appendices should be sent as **.doc** files as well. Do not save as **.docx** files in Windows XP.

When saving the file, please make sure that the copy has all tracked changes accepted into the final version, unless it is undergoing further editing.

Convert all Word files into Acrobat Portable Document Format (PDF) files.

Do not password protect or encrypt Word documents or PDF files.

Document Properties

The properties of the file must be filled out in Word and in the PDF. Go to File > Properties menu in either program and complete the information in the summary or description portion. The areas that must be filled out are:

Word Properties

- ❖ Title
- ❖ Subject
- ❖ Author
- ❖ Manager
- ❖ Company (Calif. Energy Commission)
- ❖ Category (optional)
- ❖ Keywords
- ❖ Comments (optional)

Acrobat Properties

- ❖ Title
- ❖ Author
- ❖ Subject
- ❖ Keywords

File names should be descriptive of the report. So, when the Word file is sent to the Energy Commission, it can be named anything as long as it is descriptive. The file name for the Word and PDF files will eventually be given the publication number of the report or appendix. For example, CEC-180-2010-004.PDF is the file name of the PDF file for this ***Style Manual***.

You should also set the properties of a PDF file so that the file fits the computer screen. This is set under the Acrobat Document Properties → Initial View. Set the page layout to “single page.” Set the magnification to “fit page.” This way when the PDF file is opened, the full cover will appear rather than a portion.

Graphics and Figures

The author must send a copy of ALL graphic files used in the report along with the final document file. These files should be sent to the contract or project manager on a CD-ROM if they cannot be sent easily via e-mail.

The following are things to remember regarding graphics, photographs, and images of figures.

- Embed the graphic in the report document but also save each file separately from the main report.
- Save photos in their original or raw digital format (if available) as well as in JPG or PNG. Do not use TIF or GIF files unless forced to.
- If a photo is manipulated to change contrast or fix elements, save files in Adobe Photoshop® PSD format (please include layers if used) and in JPG or PNG formats. Please make a notation that photo was manipulated and what was done.
- Save illustrations and graphic elements in their original format such as Adobe Illustrator, Adobe InDesign, or Macromedia Freehand.
- Graphics and photographs should be saved at a higher resolution, at least 300 dots per inch (dpi). Do not use lower-resolution (72 or 96 dpi) graphics that are found on websites, as they do not reproduce well in printed documents.
- Label graphic file names so they correspond with their figure title in the report. For example, if you have a photograph used as Figure 23, label the file name as figure_23.jpg.
- Use underscores (_) between words in file names instead of spaces.
- Do not use the following characters in a file name: ! @ # \$ % ^ & * () : ; { } [] / \ |

Please note that Energy Commission publications are in the public domain because they are funded by public money. As such, photographs or other graphic files also are in the public domain. The Energy Commission reserves the right to use photographs or other graphic files contained in PIER project reports in other publications or on the Energy Commission website.

Accessibility of Documents in Word and PDF

The California Energy Commission websites must comply with American with Disabilities Act regulations. These include Section 508 of the Federal Rehabilitation Act of 1973, as amended (29 U.S.C. 794d); California Government Code Section 11135 (d) (1-3); and State Administrative Manual (SAM) Chapters 4800-4833.

Because of that requirement, all PDF files will need to have informational tags embedded within the document to alert screen readers about elements of the document. This includes

having images tagged, paragraphs ordered for screen readers (especially if using two-column design), and other elements.

Please contact the Commission's Webmaster at mediaoffice@energy.state.ca.us for information about making sure that the elements in PDF files are properly tagged and encoded.

Additional information about making Acrobat PDF files accessible can be found on the Adobe Systems Incorporated website at: www.adobe.com/accessibility/

CHAPTER 10:

Use of the California Energy Commission Seal And the PIER Logo

The California Energy Commission seal and the PIER logo may not be used on documents, equipment, or websites without permission.

The seal is used by the Energy Commission to indicate official information and/or official Commission publications. If it is used by other entities, it could be construed as an endorsement of a product or process, and the Commission and the State of California cannot provide such endorsements. The seal should also not appear on any website other than ones hosted and maintained by the Commission.

The Energy Commission is aware of statements in marketing literature stating or implying Commission “approval” of products or services. The Energy Commission does not endorse, favor, or recommend any particular product or service. Moreover, California law states that:

“It is unlawful for any person, firm, corporation, or association that is a nongovernmental entity to... solicit the purchase of or payment for a product or service...by means of a mailing, electronic message, or Internet website that contains a seal, insignia, trade or brand name, or any other term or symbol that reasonably could be interpreted or construed as implying any state or local government connection, approval, or endorsement....”

California Business and Professions Code, Section 17533.6.

Occasionally, the Energy Commission seal and PIER logo are used on banners or posters for workshops, meetings, or conferences where the Commission is a sponsor or co-sponsor. Or there may be another reason for the Commission seal or PIER logo to appear on project-related items.

Those uses require approval by the Energy Commission Media and Public Communications Office **before** a product is created. Draft versions of printed documents that may include the Commission seal or PIER logo will need to go through an approval/review and sign-off process.

If you have a question about the use of the Energy Commission seal or the PIER logo, please contact the Media Office at 916-654-4989.

APPENDIX A: Common Editor / Proofreading Marks

Symbol	Example	Meaning
	weeke	delete letter, word, phrase
	febu ^r ary	insert
/ #	power/plant	insert space
	close up	close up
Sp.	1 st	spell out
=	fulltime	insert hyphen
LC	B	make letter lowercase
/	B	make letter lowercase
≡	b	make letter uppercase
	sotry	transpose letters, words
	Ph.D.	insert period
	members, who	insert comma
¶	end. In the	start new paragraph
STET	final report	let it stand (ignore mark)
<u>ital</u>	<u>Time Magazine</u>	change to italic
<u>B</u> or bold	<u>Figure 12</u>	change to bold

APPENDIX B:

Acronyms and Definitions

Used By Energy Commission Contracts Office

Acronyms

A&E	Architectural & Engineering
ADA	Americans with Disabilities Act
CCC	California Civil Code
CCM	Commission Contract Manager
CCR	California Code of Regulations
CEQA	California Environmental Quality Act
CMAS	California Multiple Award Schedule
CO	Contracts Officer
CON	Contract Opportunity Notice
CSCR	California State Contracts Register
DGS	Department of General Services
DOF	Department of Finance
DVBE	Disabled Veteran Business Enterprise
GC	California Government Code
IA	Interagency Agreement
IFB	Invitation for Bids
IT	Information Technology
MM	Management Memo
MOU	Memorandum of Understanding
MSA	Master Services Agreement
NCB	Non-Competitive Bid
OLS	Office of Legal Services, DGS
OSDC	Office of Small/DVBE Certification
PCC	Public Contract Code
PD	Procurement Division
PON	Program Opportunity Notice
RFP	Request for Proposals
RFQ	Request for Qualifications
RFQ	Request for Quotations
SAM	State Administrative Manual
SB	Small Business
SBDVBE	Small Business Disabled Veteran Business Enterprise Program
SCM	State Contracting Manual
SOW	Scope of Work
2CCR	Title 2, California Code of Regulations

Definitions

ADVANCE PAYMENT - Any payment made to a contractor before work has been performed or goods have been delivered. Advance payments are permitted only if authorized by statute. (For example, interagency agreements may provide for advance payments under GC, Section 11257).

AGREEMENT - A contract.

AMENDMENT - A formal modification or change of a material term, such as the term, cost, or scope of work, in one or more provisions of an existing contract.

ASSIGNMENT - Transfer of contractual rights from one person to another.

BID - A potential contractor's reply to a solicitation for purchase of goods or services, which represents what the contractor would charge to provide those goods or services.

BIDDER - An individual, sole proprietorship, firm, partnership, corporation, or any other business venture that responds to an Invitation for Bids or Request for Proposals by submitting a bid. A potential contractor.

BOARD RESOLUTION - A formal decision by the governing body of a public agency, often required to authorize the purchase of goods or services, or to authorize a contract for services.

BREACH OF CONTRACT - Failure, without legal reason, to comply with the terms of a contract.

CALIFORNIA STATE CONTRACTS REGISTER - The state publication, now electronic, containing advertisements for contract solicitations and a list of contracts for which exemptions from bidding have been approved.

CERTIFIED SMALL OR MICRO-BUSINESS - A business that has been certified by the Small Business and DVBE Certification Program, Department of General Services, as a small or micro-business defined in GC, Section 14837 and 2CCR, Section 1896. The OSDC issues the business a letter of certification that allows the business to claim the small business preference when submitting bids or proposals and to obtain statutory penalties for late payments on contracts. (SCM 8).

CIRCUMVENTION - The act of avoiding the effect or intent, going around, defeating by ingenuity or strategy, or nullifying the purpose, (as in circumvention of competitiveness).

CMAS CONTRACT - A contract awarded using the California Multiple Award Schedule.

COMMERCIALLY USEFUL FUNCTION - Any time a subcontract is awarded to a certified Small Business or Micro Business for Small Business Preference, or Disabled Veteran Business Enterprise (DVBE) for goal participation, that subcontractor(s) must be providing goods or services that contribute to the fulfillment of the contract requirements by performing a commercially useful function. A certified small or micro business or DVBE is deemed to perform a commercially useful function if it does all of the following:

1. Is responsible for the execution of a distinct element of the work of the contract.
2. Carries out its obligation by actually performing, managing, or supervising the work involved.
3. Performs work that is normal for its business services and functions.

4. Is not further subcontracting a portion of the work that is greater than that expected to be subcontracted by normal industry practices.

A contractor, subcontractor, or supplier will not be considered to perform a commercially useful function if the contractor's, subcontractor's, or supplier's role is limited to that of an extra participant in a transaction, contract, or project through which funds are passed in order to obtain the appearance of small, micro business or DVBE participation.

COMMODITIES - Goods, including such tangible items as movable or personal property, as opposed to services.

COMPETITIVE BIDDING - A purchasing process in which the opportunity to make offers to supply goods or services is not limited to any one bidder. All bidders are evaluated on the same fixed criteria.

CONSIDERATION - Something of value that induces a person to enter into a contract. The consideration may include some right, interest, profit, or benefit obtained by one party, or some forbearance, detriment, loss, or responsibility assumed by the other party.

CONSULTING SERVICES CONTRACT - A contract for services of an advisory nature, which provides a recommended course of action or personal expertise. The definition does not include A&E contracts (PCC 10335.5; SCM 3).

CONTRACT - A legally binding agreement between the state and another entity, public or private, for the provision of goods or services.

CONTRACT MANAGER - A staff person designated by the Commission to manage performance under a contract. No staff member of the Commission may act as a Contract Manager until they have become certified by taking the contract management training given by the Contracts Office.

CONTRACTOR IDENTIFICATION NUMBER - The number assigned to the contractor for tax purposes. This may be the contractor's social security number, or the federal identification number. Contract Managers are responsible for obtaining this number from the contractor and providing it on the form CEC-26 in a contract request package.

COOPERATIVE AGREEMENTS - A special agreement with the federal government in which there is a general public benefit, as opposed to a specific benefit accruing only to the contracting federal agency.

CORPORATION - A fictional entity, created by or under the authority of the laws of a state, which has the legal authority to engage in certain activities.

DEFAULT/BREACH - Failure to perform an obligation in a contract.

DIRECT COST - Any cost that can be specifically identified as generated by and in accordance with the provisions or activity requirements of the contract.

DISABLED VETERAN BUSINESS ENTERPRISE - A business that meets the criteria set up by the Military and Veterans Code, Section 999(g).

ENCUMBRANCE - A commitment of funds guaranteeing a source of payment for a specific transaction.

ENCUMBRANCE DATE - Date that funds have to be allocated to a contract, grant, or purchase order by.

Generally, there is one year to encumber the funds from the beginning of the fiscal year.

ENTERPRISE ZONE ACT - (GC, Sections 7080 et seq.) Provides preferences for state contracting opportunities in designated enterprise zones.

EVALUATION COMMITTEE - A committee or panel of three or more that convenes to evaluate the qualifications of bidders who respond to RFPs or RFQs.

EXECUTION OF A CONTRACT - The act of signing a contract, which provides a legal basis for required performance by parties to the contract.

EXECUTIVE ORDER - A directive issued by the Governor that establishes binding policy for government agencies covered therein.

EXEMPTION - A formal waiver by DGS, of DGS responsibilities required by statute, regulation, or policy, or a delegation of such responsibilities by DGS to a state agency. Some common exemptions awarded by DGS involve contract approval, advertising, and competitive bidding requirements.

GENERAL PROVISIONS - Terms and conditions that apply to all contracts for services and are included in any final document.

GOOD FAITH EFFORT - A sincere effort to meet the legal steps made by a bidder or potential contractor to meet DVBE goals as defined in PCC, Section 10115.2(b) and the implementing regulations.

HEARING - A formal proceeding, customarily public, in which evidence is presented and issues of fact or law are adjudicated.

INCOME/REVENUE CONTRACT - A contract in which the Commission is receiving money in exchange for services provided.

INDEMNIFICATION - Contractual provision in which one party will reimburse the other party for settlements or judgments on claims arising from the contract.

INDIRECT COST RATES/OVERHEAD - An amount or pro rata share of existing salaries and benefits, rent, equipment, materials, and utilities attributable to a function or activity but not necessarily generated by the function or activity.

IN-KIND SERVICES - Services performed in exchange for other services in lieu of money.

INTERAGENCY AGREEMENT - An agreement between two or more state agencies (GC, Sections 11256-11263; SCM 3.03).

INVITATION FOR BIDS (IFB) - A type of solicitation document, used in a formal competitive bidding process, which contains a precise statement and complete specification of what the Commission is attempting to purchase. Qualifying bidders compete solely on the basis of cost.

JOINT POWERS AGENCY - An agency formed by agreement of two or more public agencies. Under this agreement, the joint powers authority may exercise any power common to the contracting parties (GC, Section 6502).

LEGAL SERVICES CONTRACT - Any contract for services rendered by an attorney. Legal services contracts are exempt from advertising or solicitation.

LIQUIDATION DATE - Date that all funds must be paid out, or expended. Generally, there are two years to liquidate the funds after encumbrance.

LOCAL AGENCY MILITARY RECOVERY AREA ACT (LAMBRA) - Provides preference for state contracting opportunities in designated local agency military base areas.

MASTER SERVICES AGREEMENT (MSA) - An agreement entered into by the Department of General Services or another state agency for use by other state agencies that wish to use the same services. It may also be an agreement by a state agency for use by divisions of that agency (SCM 3.4).

MEMORANDUM OF UNDERSTANDING (MOU) - A contract between two entities, usually a signed agreement with no cost involved.

MICRO-BUSINESS - See Certified Small Business.

NON-COMPETITIVE BID (NCB) - This term replaces sole source. A situation in which only a single business enterprise is afforded the opportunity to offer the State a price for the specified goods or services.

PRE-BID CONFERENCE - A meeting with potential bidders before the proposal submission date of a solicitation.

PRIMARY RFP - The two-envelope method for evaluating proposals in which qualifications and cost proposals are submitted in two separate sealed envelopes. Qualifications are first evaluated according to criteria set in the RFP. For Bidders who meet the minimum qualifications standards, the scoring team then evaluates the cost proposals. The award is made to the lowest bidder meeting the minimum qualifications, if that bidder is deemed to be commercially useful.

PROGRESS PAYMENTS - Partial payments related to steps or phases toward the completion of the required services under a contract.

PROMPT PAYMENT ACT - Statutory provisions that set interest penalties on late payments for state contracts (GC, Sections 926.15, 926.17).

PROPRIETARY SOFTWARE - Software that is owned and copyrighted by the contractor who in turn sells licenses for the use of this product.

PROTEST - A formal challenge by a bidder to the intended award of a contract via solicitation.

PUBLIC ENTITY - A county, city, district, local public body, state board, state commission, federal agency, or joint powers authority.

RESOLUTION - A formal decision by the governing body of a public agency, often required to authorize the purchase of goods or services.

RESPONSIBLE BIDDER - A bidder who is fully capable of performing the contract. When there is documented evidence that a bidder is not financially qualified or is otherwise unable to perform the required services, the bidder may be deemed not responsible and the bid may be rejected by the awarding agency. The bidder may then protest the intended award of the contract and is entitled to a hearing.

RESPONSIVE BIDDER - A bidder whose bid meets the specifications and other requirements contained in an RFP or RFQ.

SECONDARY RFP - The method for evaluating proposals obtained through the RFP in which an evaluation panel assesses each proposal according to a set of criteria, of which one must be the cost. Each criterion is assigned a weight, with substantial weight going to cost. The award is made to the bidder whose proposal is given the highest score.

TARGET AREA CONTRACT PREFERENCE ACT (TACPA) - TACPA (GC, Section 4530 et seq.) provides preferences for contract